Extra Information for

Breastfeeding Peer Counselors

This module applies to the following security roles:
Breastfeeding Peer counselor

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Bureau of Family Health
Nutrition and WIC Services
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This module requires use of the computer and the on-line KWIC Training Application.

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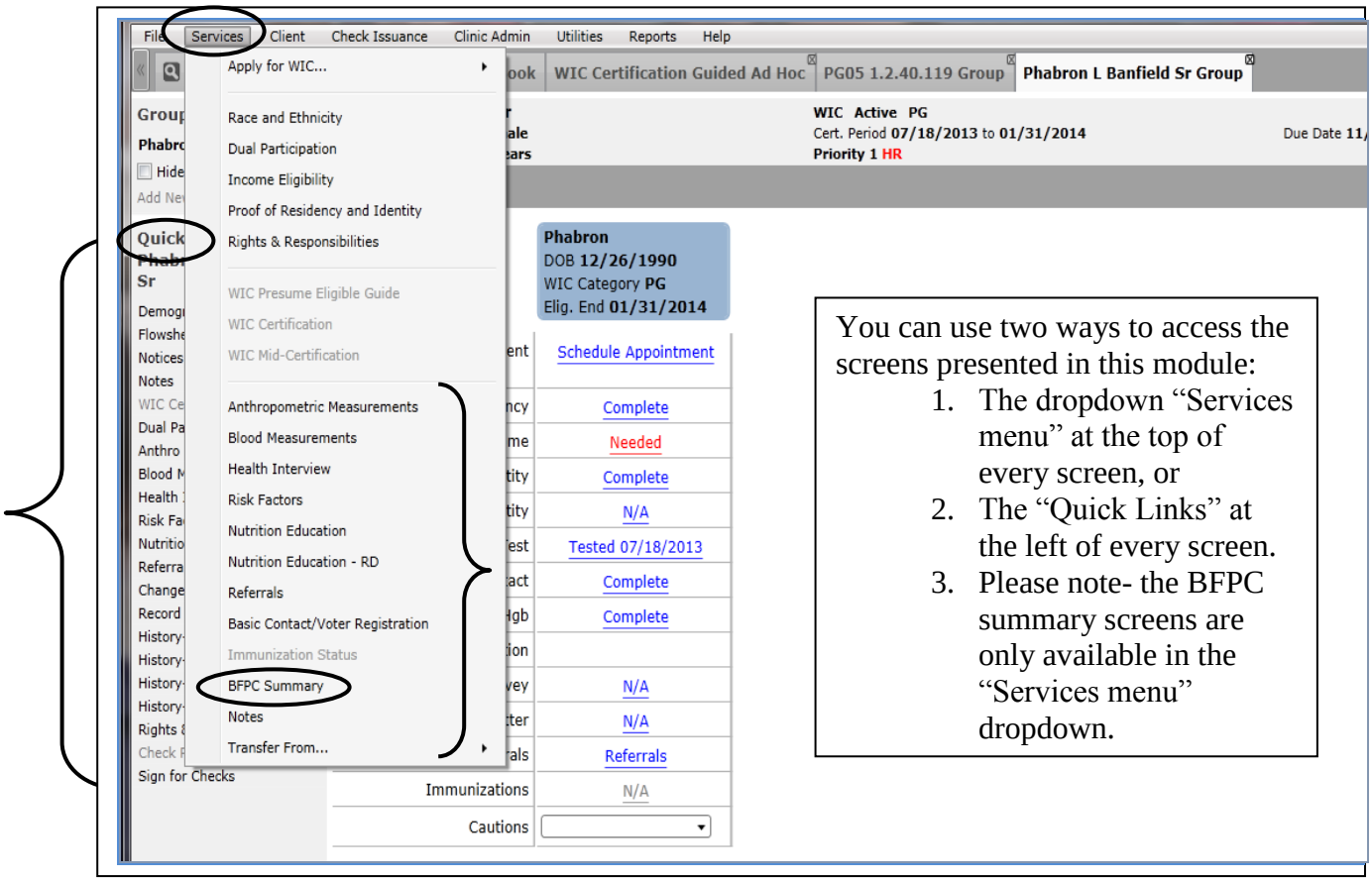
Objectives

Upon completion of this activity, the employee will be able to use the following screens in KWIC Client Services to support the Breastfeeding Peer Counselor role.

1. BFPC Summary Windows – Contact and Topics
2. Notes
3. Referrals
4. Nutrition Education Topics and Handouts
5. BFPC Referral and Contact Reports

Introduction

The information in a portion of this module is taken from limited pages in the "Certification Guides" training module, but limited to screens that might be used by the BFPC. BFPC Summary contains two windows for use by BFPCs only – Contact and Topics.



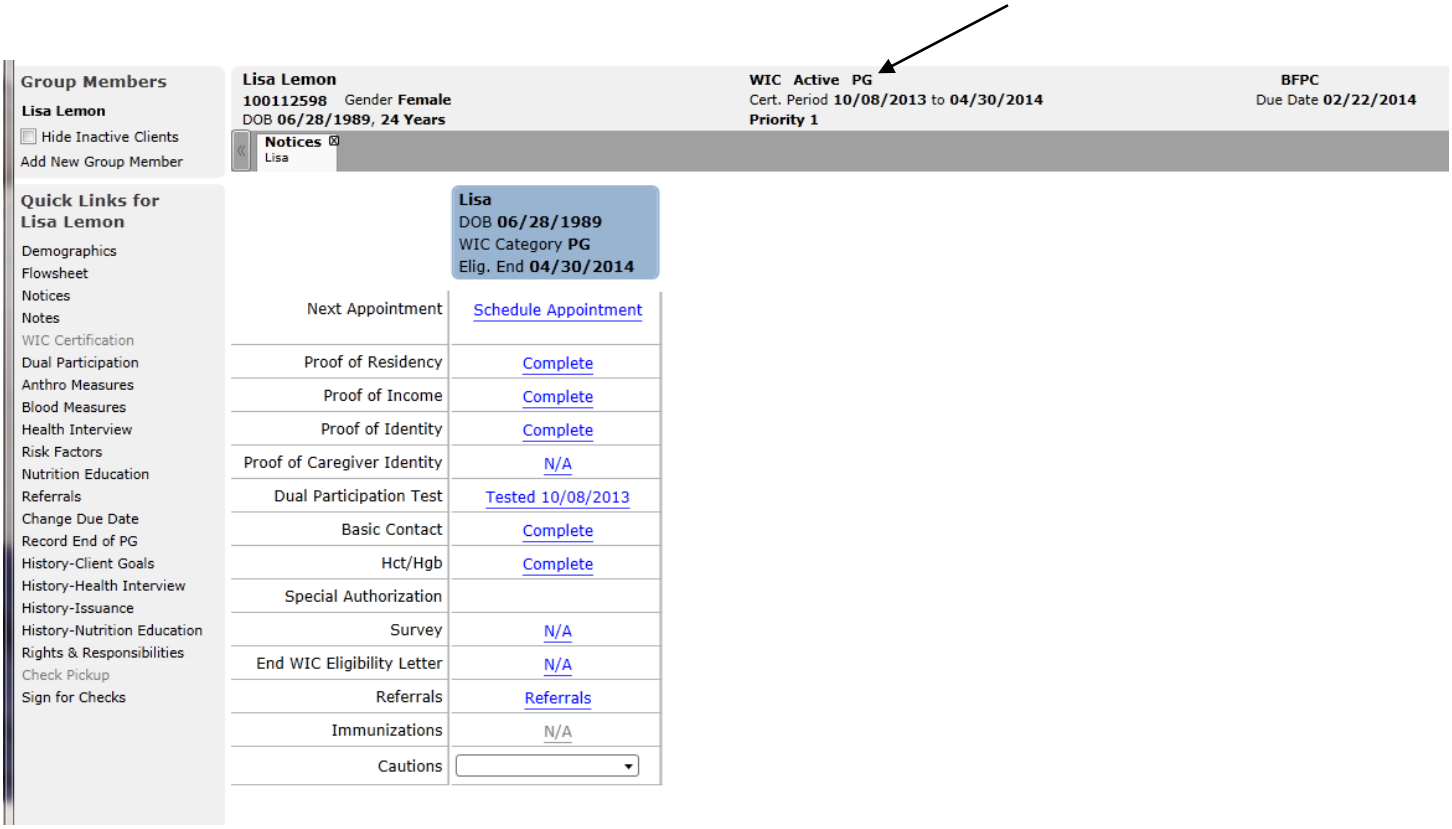
You can use two ways to access the screens presented in this module:

1. The dropdown "Services menu" at the top of every screen, or
2. The "Quick Links" at the left of every screen.
3. Please note- the BFPC summary screens are only available in the "Services menu" dropdown.

In this module we will use the pregnant client Lisa Lemon and breastfeeding client Peggy Plum as our examples.

Before you proceed farther, use the Find Client screen to find Lisa and Peggy and retrieve their KWIC record.

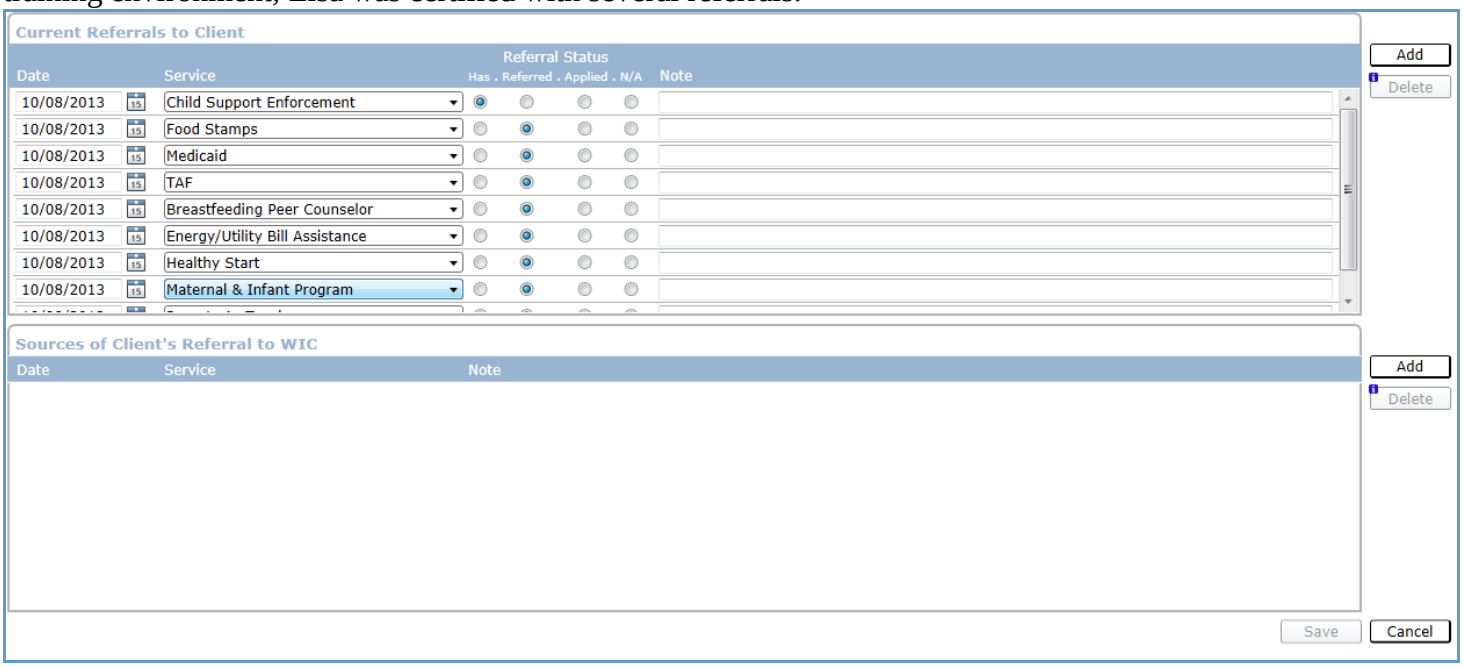
Because the training environment is "redated" every month, the dates you see in the KWIC training environment will not be the same as in these screen shots. Please "click along" as you read.



Referrals

Click the **Referrals** link in Quick Links (or use the dropdown menu from "Services") to open the Referrals window for Lisa Lemon. Notice that there are two sections to this window – **"Current Referrals to Client"** at the top and **"Sources of Client's Referral to WIC"** at the bottom.

Normally you will see a screen like this, with referrals already made from the certification. In the training environment, Lisa was certified with several referrals.



Current Referrals to Client

In the real Client Services, the following mandatory referrals are always displayed in the Current Referrals to Client section and appear first:

- Child Support Enforcement
- Food Stamps (Kansas Food Assistance Program)
- Medicaid – (Health Wave19 Card)
- TAF (Temporary Assistance for Families) Clients may know this as "Cash Assistance."

To Document A Referral Made To The Client:

Select one of the following referral codes for each of the mandatory referrals:

- **Has** – indicates the client currently has/receives the services.

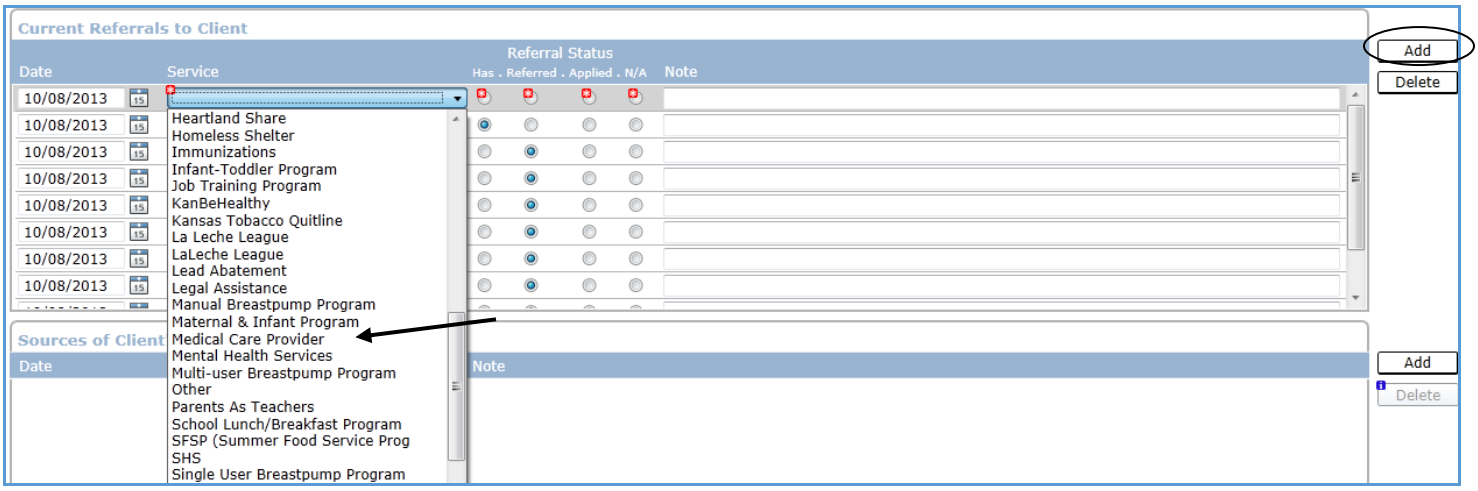
- **Referred** – indicates staff referred the client to the service. The client may or may not be interested in the service at this time. If you tell them about the program and they are not interested, still mark "Referred".
- **Applied** – indicates the client has already applied for the service.
- **Not Applicable** – indicates the service is not applicable to the client. For instance, Not Applicable would be appropriate for Child Support Enforcement when a woman is married to the father of her child.

To make another referral or document that the client is enrolled in another service program, click the **[Add]** button in the Current Referrals to Client section of the screen to get a blank line and then click in the blank Service box. Select the name of the service from the Service drop-down display. Use the Scroll Bar to see more Referral choices.

Mark "Has", "Referred" or "Applied" as appropriate. Add any other lines for other services as needed.

For instance, let's say that while talking with Lisa, you encouraged her to see her doctor. Follow these steps to document that you made this referral.

- Click the Add button to a blank line. Click in the blank Service box, scroll down to find "Medical Care Provider" and click it to select it.
- Click the Referred button
- Click Save
- If you add too many blank lines, click the Delete button if a blank service line is not needed.
- A note may be added in the Note field.



Do not leave blank referral lines. If you have a blank line, the window will not save. Use the **[Delete Line]** button to "erase" a line that was added, but not needed.

Inactivated service choices are shown in red print. Local Staff with KWIC Administrator security status are allowed to add locally specific names of services. (Refer to KWIC Administrator module.)

Source of Client's Referral to WIC

It is **optional** to document the source of a client's referral to WIC. Clinics might want to do this if they have been having a particular outreach campaign and want to collect data to determine if the outreach to a particular source was effective.

As a BFPC, you will usually never use this part of the screen, but the process of using the **[Add]** and **[Delete Line]** button is the same.

Skill Builder

Use Lisa Lemon's Referral screen.

1. Document that you referred her to La Leche League.

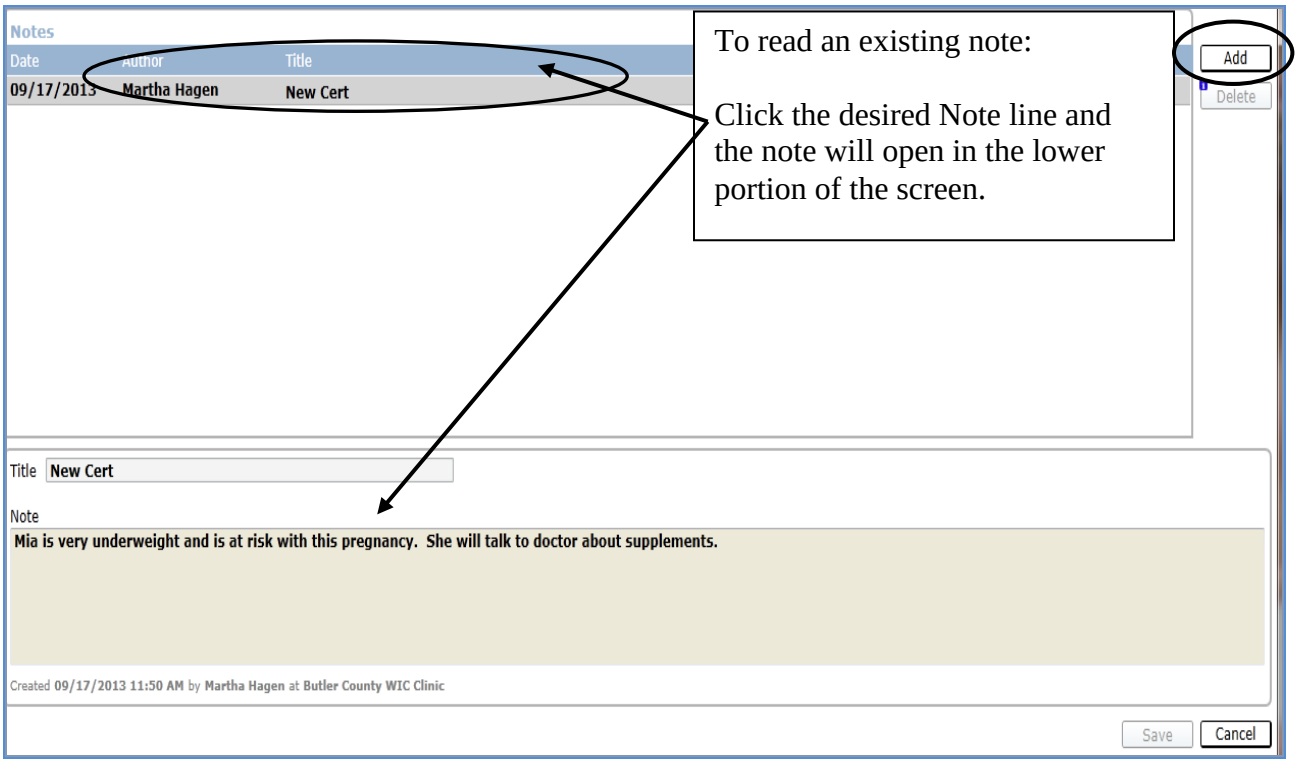
2. Add a referral line and select BFPC Program. Document "Referred." Once you contact Lisa and she has agreed that she wants you to continue contacting her, your supervisor may want you to return to the Referral screen and mark Lisa as "Has" for the BFPC Program. Be sure to ask you supervisor if you should do this for clients who agree to participate in the BFPC Program.

> Repeat reminder – Ask your supervisor if you should mark a client as "Has" for the BFPC Program on the referral screen if they agree to participate.

Notes

Click the **Notes** link in Quick Links (or use the dropdown menu from "Services") to open the Notes window for Lisa Lemon. You can write a note at any time, no matter what the client's certification status. When you click on the Notes link, you get a window that will be blank for a new client. In the top section of the window, there is a list of all past notes. By the time a BFPC enters a note there should be at least one other note already entered by staff.

You can click on a line and open a past note to read the contents. For Lisa, there should be at least one note already entered. Click on the note line to open the note text in the lower part of the screen.



Please Note: BFPC's will usually add notes on the BFPC Summary Contact Window. Notes written there will auto-generate on this Notes window.

To get space to write a new note, click **[Add]** in the Notes window. This will open an area in the bottom of the window.

- Title – Make a title that indicates the purpose of the note for future readers. The title might be simple, such as "BFPC" for one of your typical contacts. On the other hand, you might **be more descriptive** when you make a note about a particular problem.

  For example, you are documenting that a breastfeeding mom called you with a problem about soreness. Which would be a better note title for you to use? "BF call from mom" or "BF Problem – Sore"? Making a descriptive title would help you go back and quickly read the correct note again. It also will draw the attention of other WIC staff when they work with this mother.

- Note body – Tab or click from the title to the note body and enter your text.

- Click **[Save]**, then **[Cancel]** to close the window.

Editing Notes

Once you save a note, it is protected from editing. (We tried to allowing editing after saving, but portions of notes were occasionally lost.) The system allows you to leave the Notes window open while working with the client record without saving. This allows you to update the notes as you work your way through the conversation (assuming you are actually in KWIC and making notes as you go along rather than adding a note later.) Other windows can be accessed using the menu drop downs, quick links or clicking on the Window menu item and selecting the desired tab. However, you cannot change clients or move between family members without saving.

If you have saved your note and need to add more, make a new note for your additions or corrections. You are strongly urged to title such a note "Corrections to BFPC note" or Addition to BFPC note" or "BFPC note, part 2" as appropriate.

Copying Notes

There might be times that you want to put the same note in the record for more than one family member. For instance you want to record the same information in records for both mom and baby. There are two ways you can do this.

- Make a note in the second record that just says something like "See BFPC note in XYZ's record."

Or…

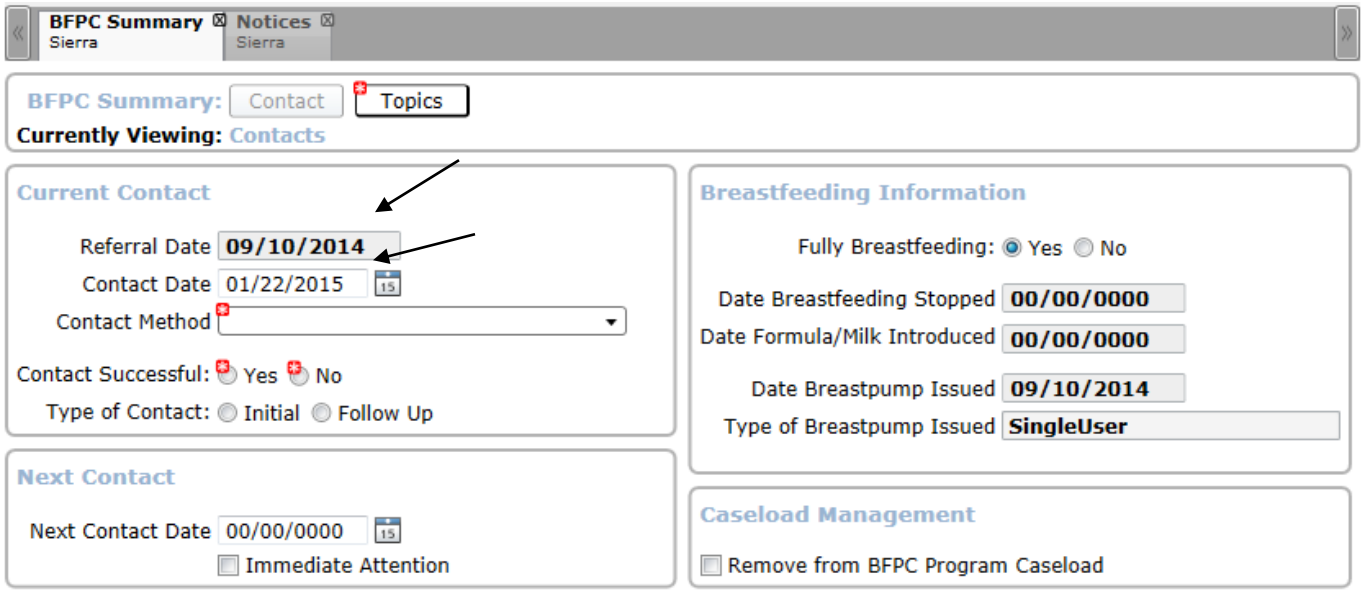
- Copy the note from the first family member into the record of the other family member.
    - Highlight the note text.
    - Right click the mouse to get a drop-down box.
    - Select "Copy"
    - Open the Notes on the other family member
    - Use the Add button to create a new note
    - Write the desired title
    - Right click in the text area for your new note to get a drop-down box.
    - Select "Paste". Add any more specific information if desired.
    - Save the note for this client.

STOP and STRETCH!

BFPC Summary Windows

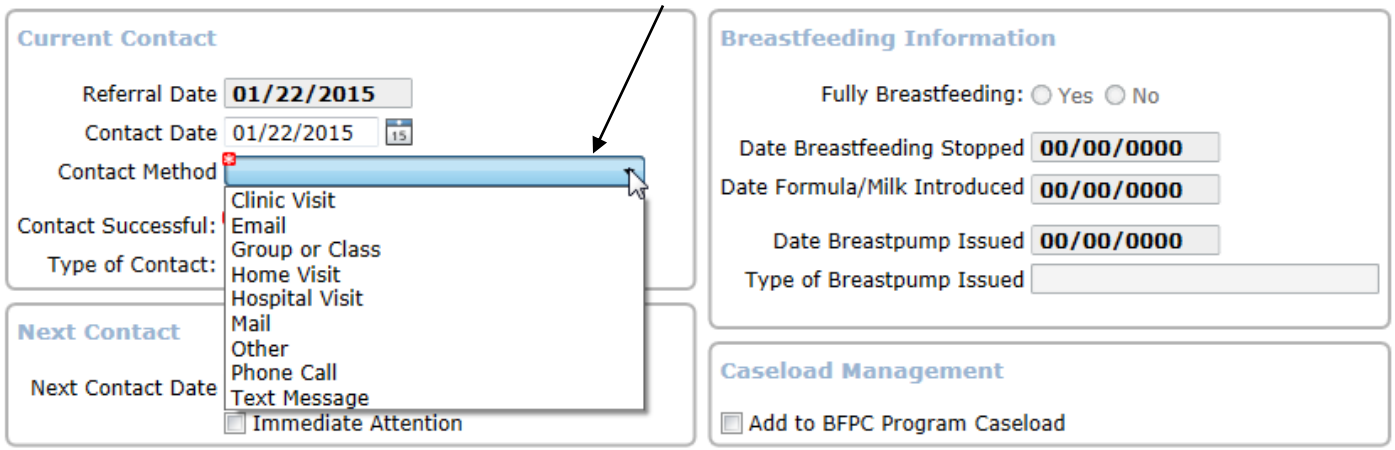
Information about clients enrolled on the BFPC Program is entered on the BFPC Contact Window. Open Lisa Lemon's BFPC Summary by clicking on BFPC Summary in the "Services" menu dropdown. (See Page 2 of this module if questions.) There are two tabs in the BFPC Summary – Contact and Topics.

If WIC staff has made a referral to the BFPC Program on the Referral window, the Referral Date on the BFPC Summary contact screen will be auto-filled. The contact date is auto-filled with today's date – you can change it by clicking on the calendar button to the right of the date and selecting a different date.

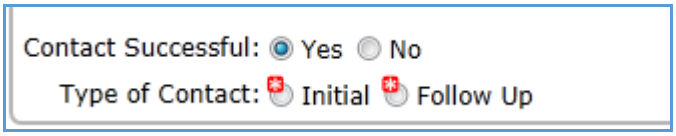


Contact Screen

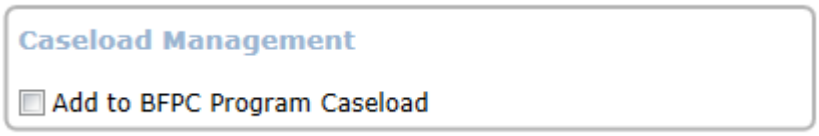
The Contact Screen allows you to enter information for each of your clients. Click on the Contact Method drop down arrow to select the type of contact you are completing.



Choose whether the contact was successful (yes or no.) You will enter more information about the contact on the topics tab. When you click Contact Successful (yes or no), you must then complete Type of Contact (Initial or Follow Up)



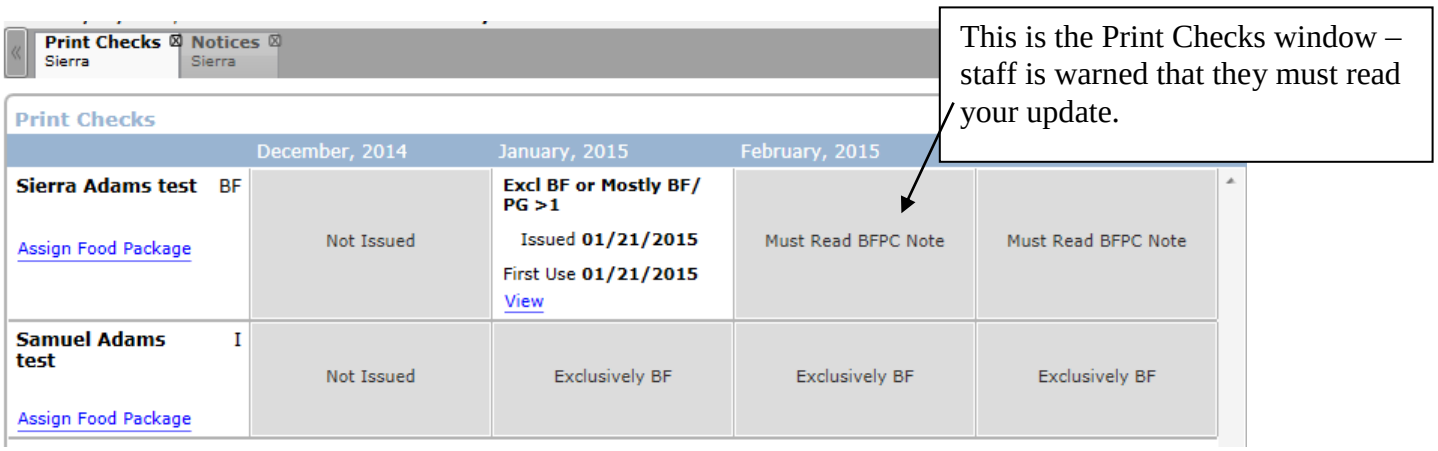
If the client wants to be enrolled in the BFPC Program – select "Add to BFPC Program Caseload" in the Caseload Management Section. The Caseload Management message then changes to "Remove from BFPC Program Caseload" after saving. When the client is no longer followed by you, remove them from the program by clicking the box next to "Remove from BFPC Program Caseload."



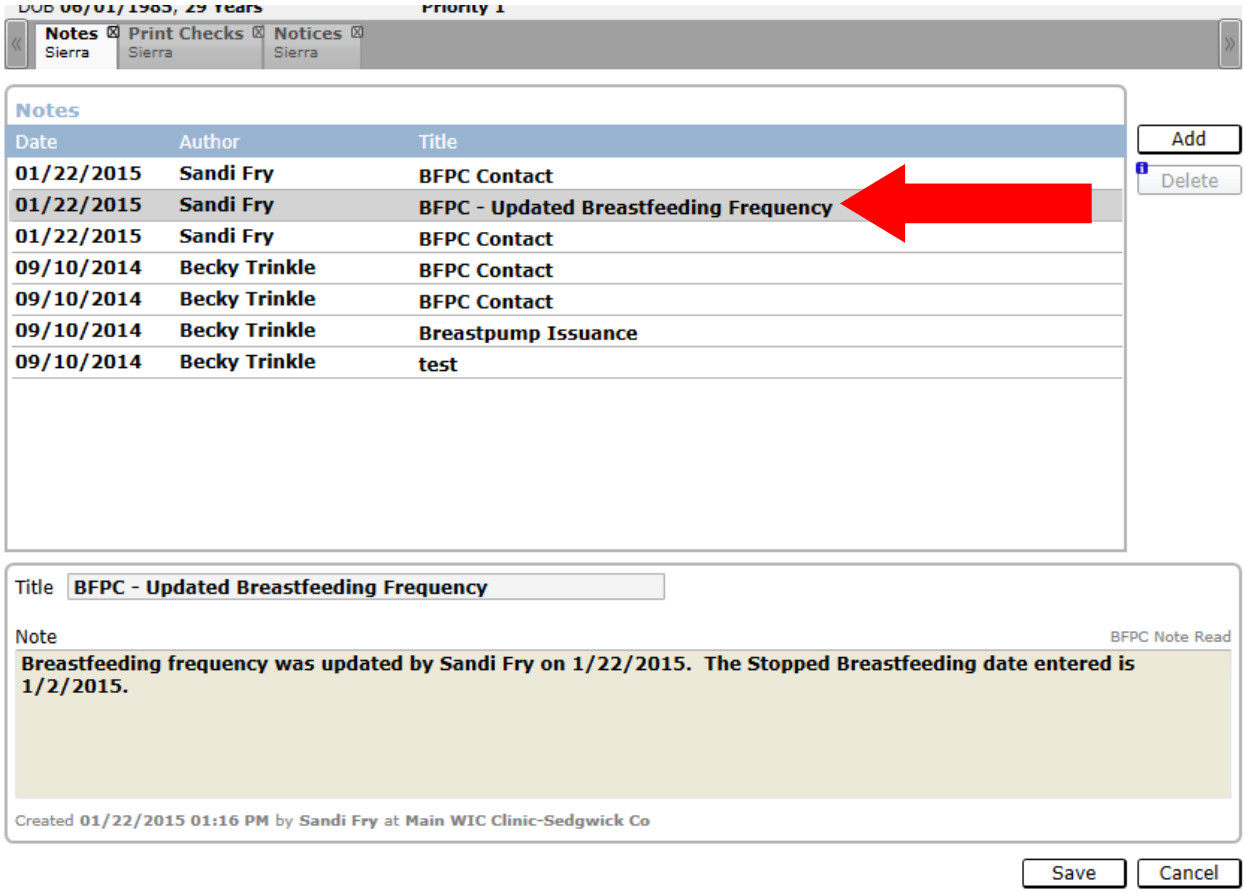
If the client is breastfeeding, choose whether the client is fully breastfeeding in the Breastfeeding Information Section. If the client is pregnant, this section can be ignored. The Date Breastfeeding Stopped should be entered if the client tells you she has stopped breastfeeding. You can also enter the date when formula is started.

Entering the Date Breastfeeding Stopped auto-generates a note on the Notes Window, "BFPC-Updated Breastfeeding Frequency."

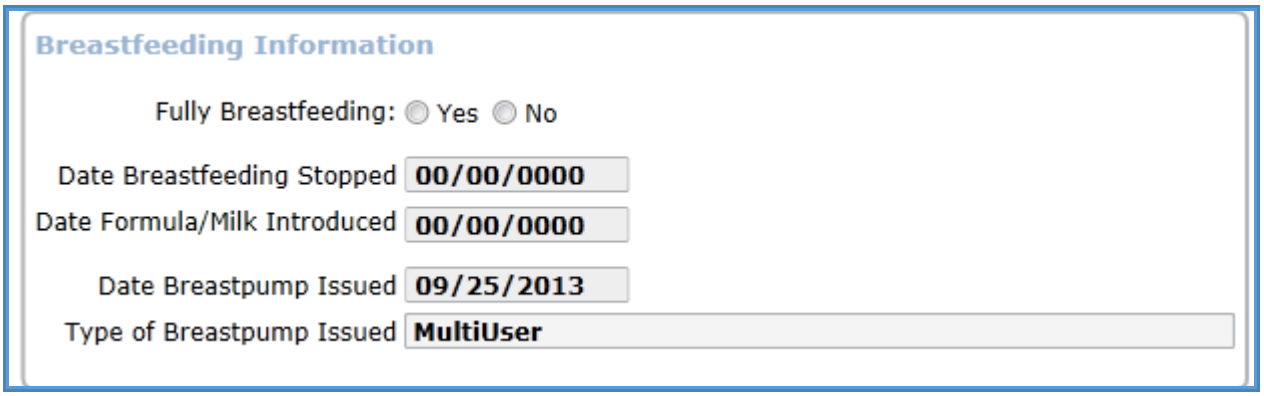
Before checks can be issued the next staff person, who can issue checks, must read the note, click the save button to close the Notes Window, and update the food package then checks can be printed. This ensures the food package for the mother is updated appropriately before issuing checks. Below is an example of what a staff person who is issuing checks will see.



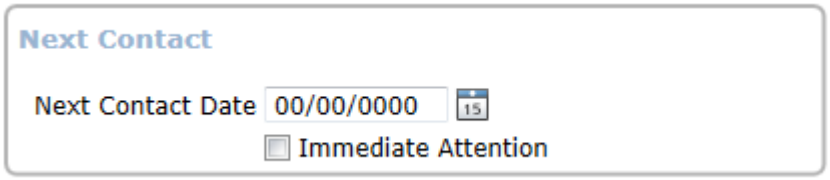
The staff person must open the note on the Notes tab and click save before any checks can be printed.



If the client is a breastfeeding client, the Date Breastpump Issued and Type of Breastpump Issued fields are auto-filled if the client has been issued a breastpump in the Issue Breastpump screen. You will have to check the Issue Breastpump screen to see if the client is issued a manual or single user electric breastpump as in the line "Type of Breastpump Issued" only MultiUser or SingleUser are listed. Lisa Lemon is a pregnant client and breastpumps can only be issued to breastfeeding clients. Open Peggy Plum's **[Issue Breastpump]** tab in the **[Client]** drop down and issue Peggy a Multi-User Electric breastpump. Select an available breastpump and put in a return date one month from now. Be sure to select a reason provided and add a note. Click **[Save.]** You will need to complete the additional contact information and click **[Save.]**



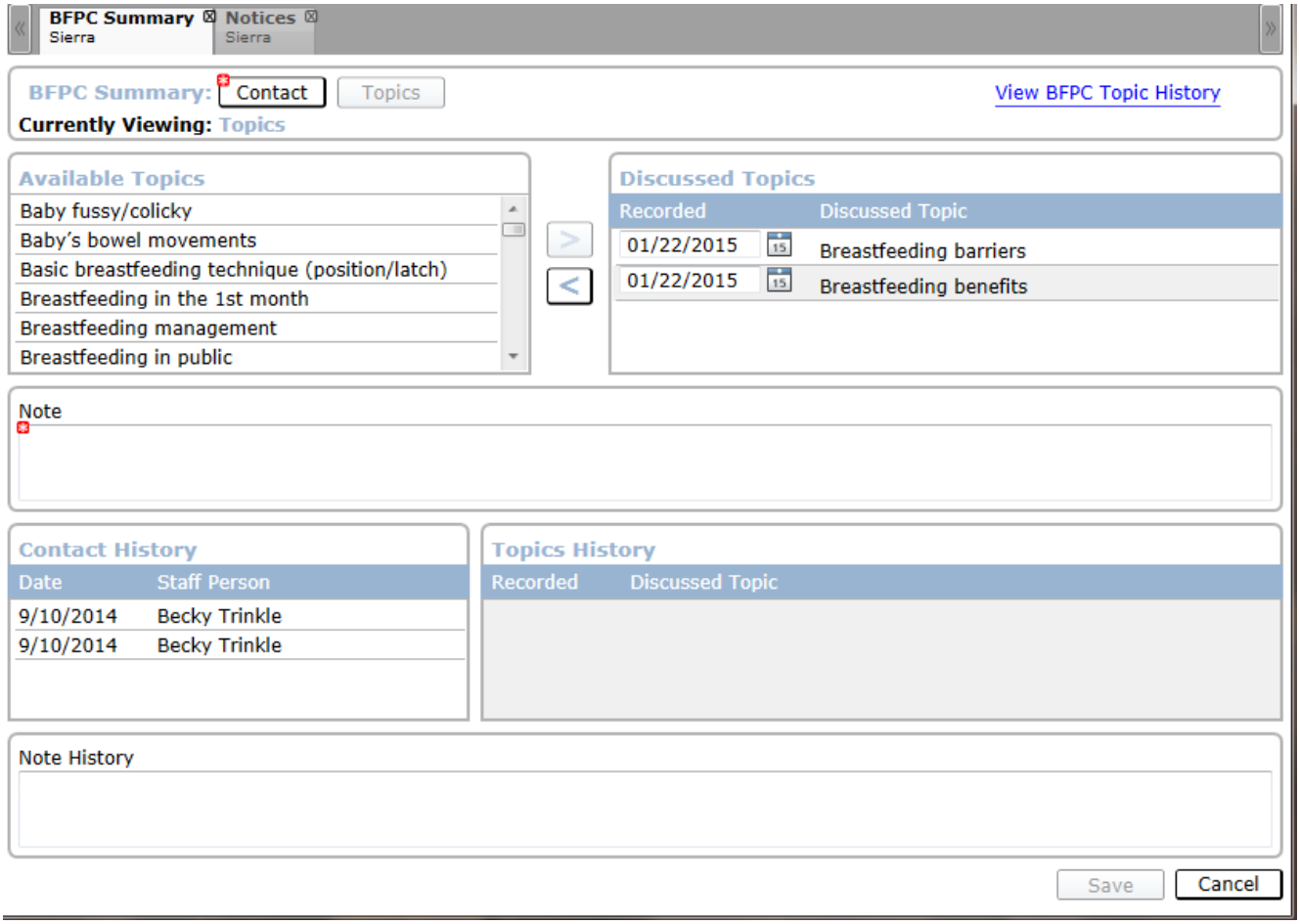
The last item to complete on the Contact screen is the Next Contact Section if a future contact is planned. This date is listed on the BFPC Referral Report. The report is discussed further along in this training – running the report lets you know when the next contact for this client is planned. Clicking the Immediate Attention box flags the client's contact as important.



Now you are ready for the Topics Tab

Topics Screen

Click on Lisa Lemon's topics tab in the BFPC Summary screens.



The Topic tab allows you to quickly document topics you have discussed with a client.

The topics are listed in alphabetical order on the left and are specific to client category – pregnant or breastfeeding. To select a topic for a client:

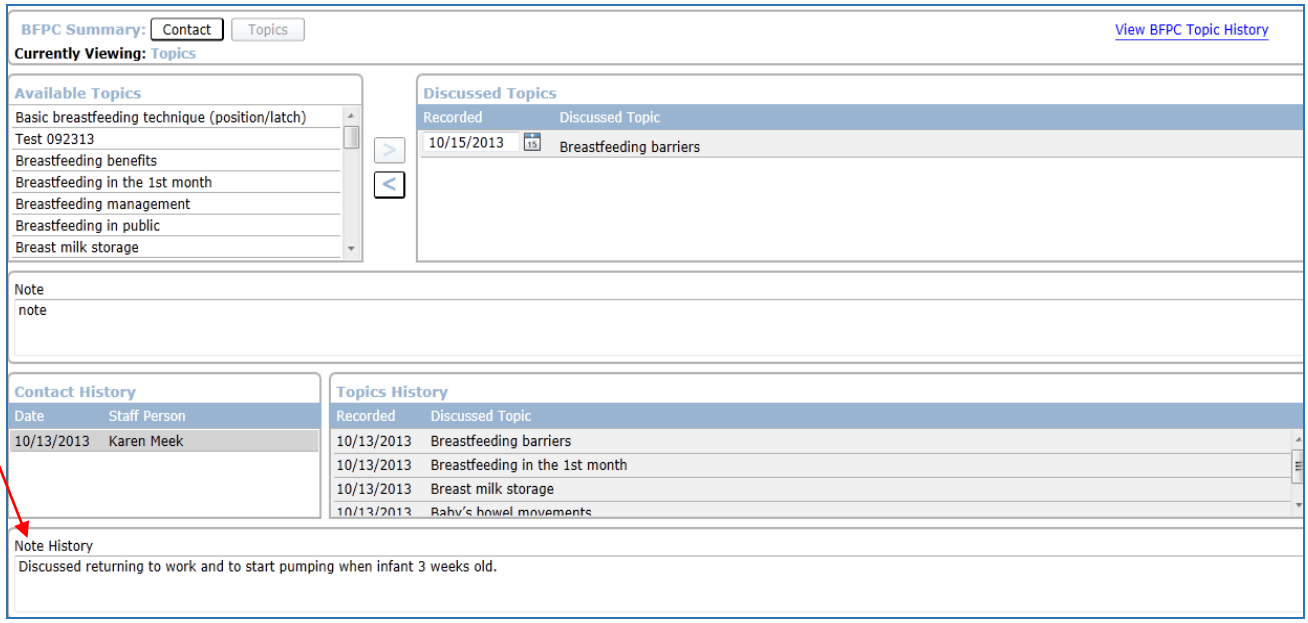
- Highlight the topic in the Topics mover box on the left and click the include arrow or
- Double click the topic on the left.

To move topics back:

- Highlight the topic in the list on the right and click the exclude arrow or
- Double click the topic on the right.

You must write a note. Your note auto-fills the Notes Window in KWIC. The title is auto-generated as BFPC Contact.

Contact History, Topics History and Note History allow you to see past contact information for the client. To read past contact information, click on the date in the Contact History Section.



Skill Builder

Open Lisa Lemon's BFPC Summary screen. If you have not already marked a contact for today, do so and complete the Contact window as follows:

1. Change the contact date to a couple of days ago. Change it back to today.
2. Select a contact method.
3. Say "yes" the contact was successful and indicate the type of contact was an initial contact.
4. Since Lisa is pregnant the Breastfeeding Information section does not need to be completed at this time.
5. Be sure to add Lisa to your BFPC Program Caseload.
6. Select a date that you will contact Lisa next week.

Complete the **Topics** window:

1. Select two topics that you discussed with Lisa today.
2. Write a note.
3. Be sure to **[Save]**. **Hint** – if save is not highlighted then you forgot to complete a required box – look for a tiny red box in the upper left hand corner of a field – that is your clue you forgot something essential.

Now select **[Notes]** in the Quick Links and read your note that was auto-generated. Your note will not show up in **[Contact History]** information unless you close Lisa's BFPC Summary tab and reopen.

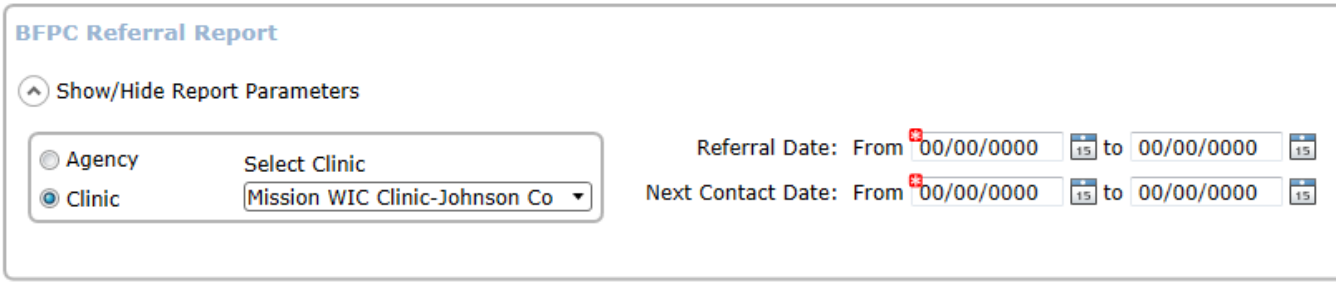
Open Peggy Plum's BFPC Summary screen.

1. Leave the contact date as today.
2. Select a contact method.
3. Say "yes" the contact was successful and indicate the type of contact was an initial contact.
4. Complete the Breastfeeding Information as fully breastfeeding. Notice that the date breastpump issued field is filled and type shows up as MultiUser.
5. Add Peggy to your BFPC Program Caseload.
6. Select a next contact date. If you select the next contact date for next week, Peggy will show up on the reports we will discuss below with Lisa!
7. Select the **Topics** window.
8. Select a topic you discussed with Peggy and write a note.
9. Be sure to **[Save].**

STOP and STRETCH!

BFPC Referrals Report

Find the BFPC Referrals Report in the "Reports" drop down list – the BFPC reports are near the top so you might need to scroll up. The name for this report may confuse you – it has a two-fold purpose. This report can be generated for a specific date range so that BFPC's can find new client referrals to contact and can track when to make additional client contacts.

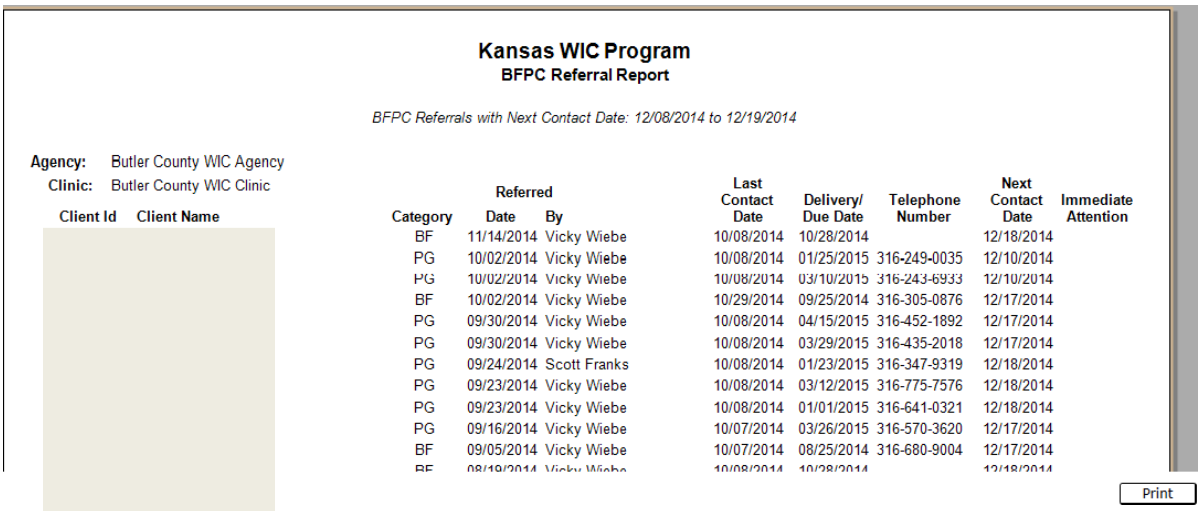


When you mark "next contact date" for a client on the BFPC Contact tab, that date will appear on this report. Running this report the first of every week lets you know who you plan to contact in a given week.

Run the report to show next contact dates

To generate the report to show clients' projected contact dates select the date range that you want the report ran for in the **[Next Contact Date]** fields. If you select no "to" date the report will run until your last next contact date.

The report shown below tells you the client's name and ID number, category, the date they were referred to you, when you last contacted them, when they are due or delivered, their telephone number and when you should contact them next. If you marked immediate attention, there is a "yes" in that column. Basically that is just a quick reminder for you that you were concerned about this client. The report can be printed or saved as an Excel spreadsheet.



Kansas WIC Program
BFPC Referral Report

BFPC Referrals with Next Contact Date: 12/08/2014 to 12/19/2014

Agency: Butler County WIC Agency
Clinic: Butler County WIC Clinic

Client Id	Client Name	Category	Referred Date	Referred By	Last Contact Date	Delivery/ Due Date	Telephone Number	Next Contact Date	Immediate Attention
		BF	11/14/2014	Vicky Wiebe	10/08/2014	10/28/2014		12/18/2014	
		PG	10/02/2014	Vicky Wiebe	10/08/2014	01/25/2015	316-249-0035	12/10/2014	
		PG	10/02/2014	Vicky Wiebe	10/08/2014	03/10/2015	316-243-6933	12/10/2014	
		BF	10/02/2014	Vicky Wiebe	10/29/2014	09/25/2014	316-305-0876	12/17/2014	
		PG	09/30/2014	Vicky Wiebe	10/08/2014	04/15/2015	316-452-1892	12/17/2014	
		PG	09/30/2014	Vicky Wiebe	10/08/2014	03/29/2015	316-435-2018	12/17/2014	
		PG	09/24/2014	Scott Franks	10/08/2014	01/23/2015	316-347-9319	12/18/2014	
		PG	09/23/2014	Vicky Wiebe	10/08/2014	03/12/2015	316-775-7576	12/18/2014	
		PG	09/23/2014	Vicky Wiebe	10/08/2014	01/01/2015	316-641-0321	12/18/2014	
		PG	09/16/2014	Vicky Wiebe	10/07/2014	03/26/2015	316-570-3620	12/17/2014	
		BF	09/05/2014	Vicky Wiebe	10/07/2014	08/25/2014	316-680-9004	12/17/2014	
		BF	08/19/2014	Vicky Wiebe	10/08/2014	10/28/2014		12/18/2014	

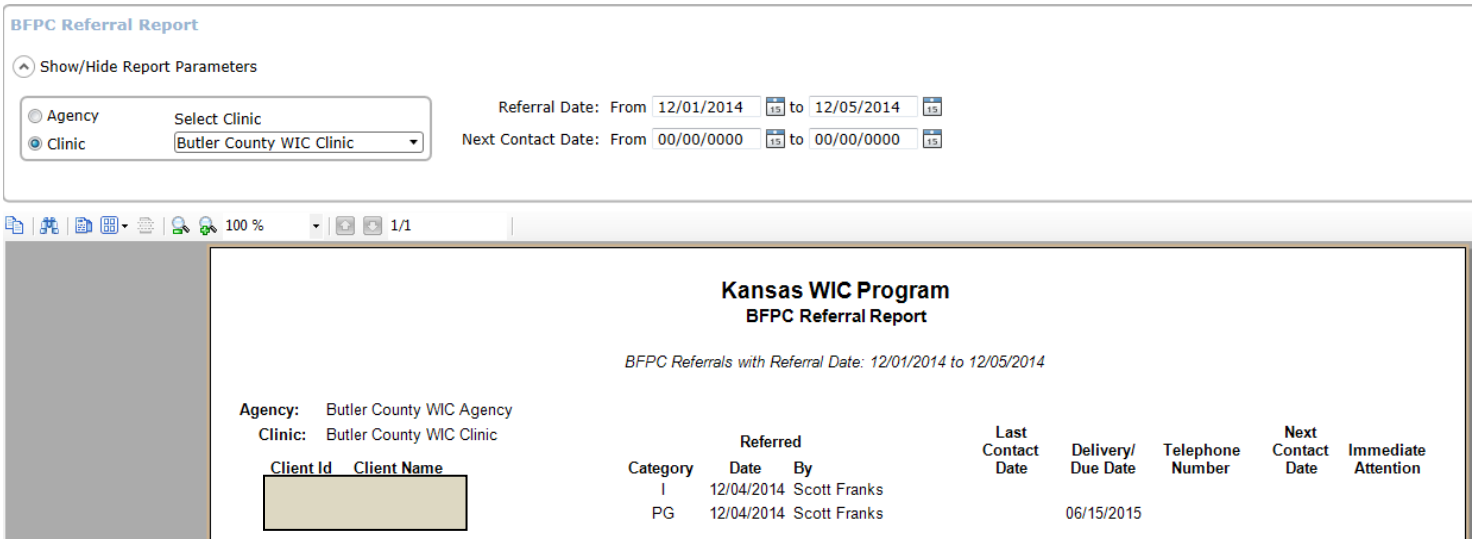
Print

HINT If you do not put in a next contact date, the client will never show on the contact report. If you do not know when you want to contact a client next, select a date in the future that you will "check" on this client such as two months in the future. In two months the client will show on the report and you can decide to contact them, keep them in your caseload or remove them from your caseload. That way you do not lose track of the client.

Run the BFPC Referral Report to see the next contact date for Lisa Lemon and run the Contact Report to see your contact and planned contact for Lisa Lemon.

Run the report to show referrals to you from other staff

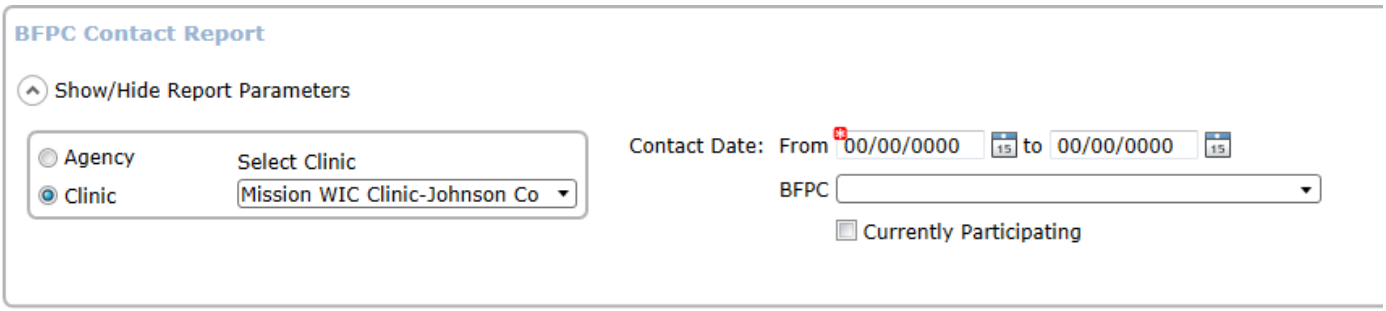
This report also can be generated to find what clients have been referred to you so that you can contact them. For example, it is Monday and you want to know what clients were referred to you last week. Run the report for the dates of the week before to find new clients that have been referred to you by clinic staff. The report below was run for one week – this BFPC had two referrals.



STOP and STRETCH!

BFPC Contact Report

The BFPC Contact Report is run to report who you have contacted or attempted to contact for a specific report range. For example, the report can be run for an entire quarter and used to complete the BFPC Quarterly Report Form. It can also be run to determine the number of currently participating clients for a specific BFPC.

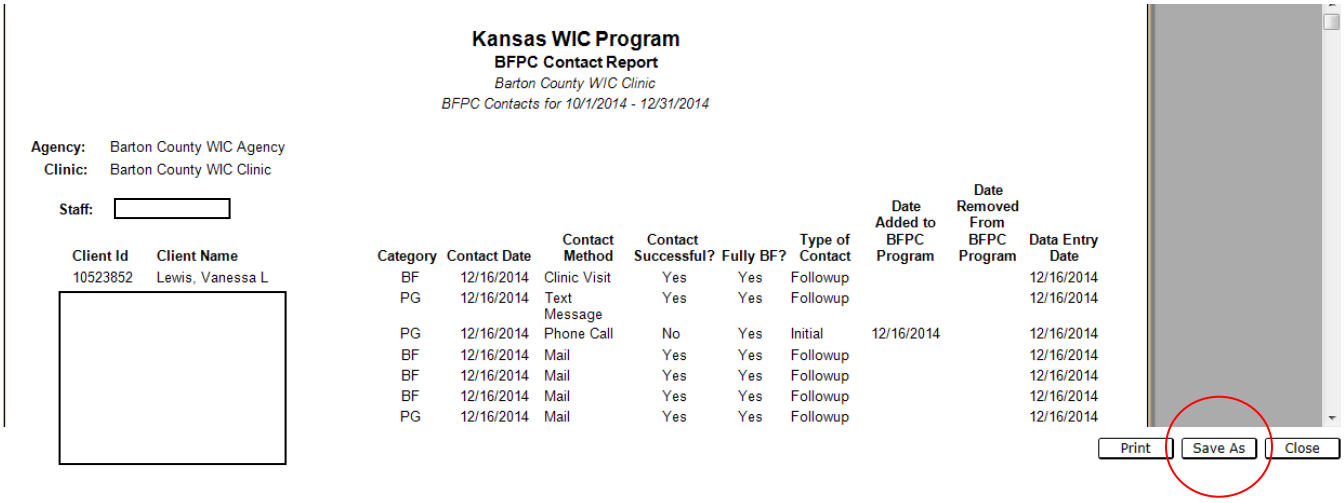


To run the report, enter a Contact Date from and to that you want information. If running for the first quarter of the Federal Fiscal Year, you would select **[Contact Date:] From** October 1, 20__ **to** December 31, 20__. You would not want to check **Currently Participating** because you want all clients during that period and some may have been removed from the program. The report tells you all the clients on the program during the period selected, type of contact (clinic visit, home visit, mail, phone call, text message etc.), if the visit was an initial visit or follow up and if it was successful. The report also lists the date added to the BFPC Program or removed from the BFPC program if those dates were in the time range selected.

To generate a list of the BFPC total caseload, be sure to check the ***Currently Participating*** box. This lists all the clients that have had the box **"Add to BFPC Caseload"** checked on the BFPC Summary Contact window.

Saving the Contact Report as Excel and Using an Excel Spreadsheet

This report can be saved as an Excel spreadsheet so that you can "manipulate" the data.



Kansas WIC Program
BFPC Contact Report
Barton County WIC Clinic
BFPC Contacts for 10/1/2014 - 12/31/2014

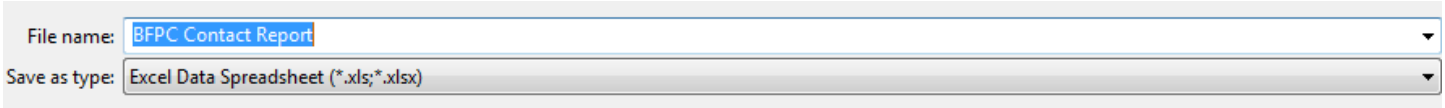
Agency: Barton County WIC Agency
Clinic: Barton County WIC Clinic

Staff:

Client Id	Client Name	Category	Contact Date	Contact Method	Contact Successful?	Fully BF?	Type of Contact	Date Added to BFPC Program	Date Removed From BFPC Program	Data Entry Date
10523852	Lewis, Vanessa L	BF	12/16/2014	Clinic Visit	Yes	Yes	Followup			12/16/2014
		PG	12/16/2014	Text Message	Yes	Yes	Followup			12/16/2014
		PG	12/16/2014	Phone Call	No	Yes	Initial	12/16/2014		12/16/2014
		BF	12/16/2014	Mail	Yes	Yes	Followup			12/16/2014
		BF	12/16/2014	Mail	Yes	Yes	Followup			12/16/2014
		BF	12/16/2014	Mail	Yes	Yes	Followup			12/16/2014
		PG	12/16/2014	Mail	Yes	Yes	Followup			12/16/2014

Print | Save As | Close

Click the **[Save As]** button. Your computer will ask you where you want to save the Excel Data Spreadsheet. You may wish to set up a special folder on your computer and save all the quarterly reports together.



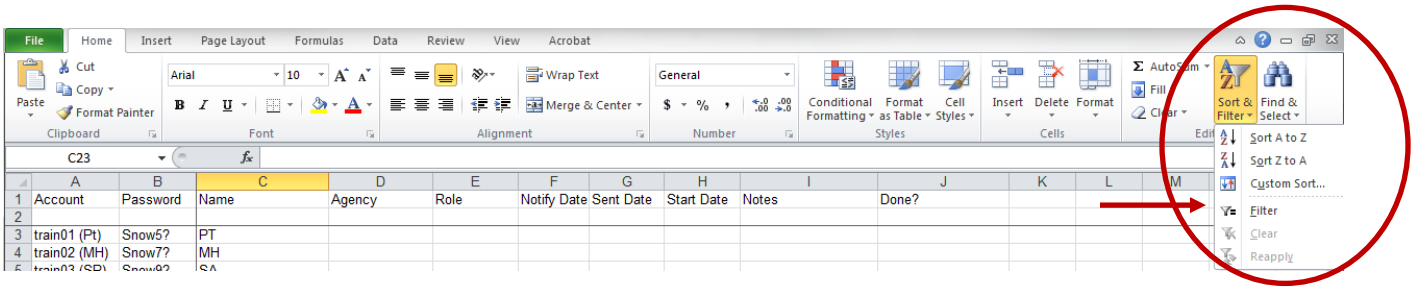
Once the data is saved as a spreadsheet it can be manipulated like any Excel spreadsheet. For example, data can be sorted and filtered which makes it easy for you to complete your quarterly BFPC report. Below is one column from a saved spreadsheet shown as it saves.

> **HINT:** You might want to save your spreadsheet twice – save one with the word "play" or "filter" in it so if you click wrong you have a "good" spreadsheet to save and play with once again. **And** don't forget to use your undo button!

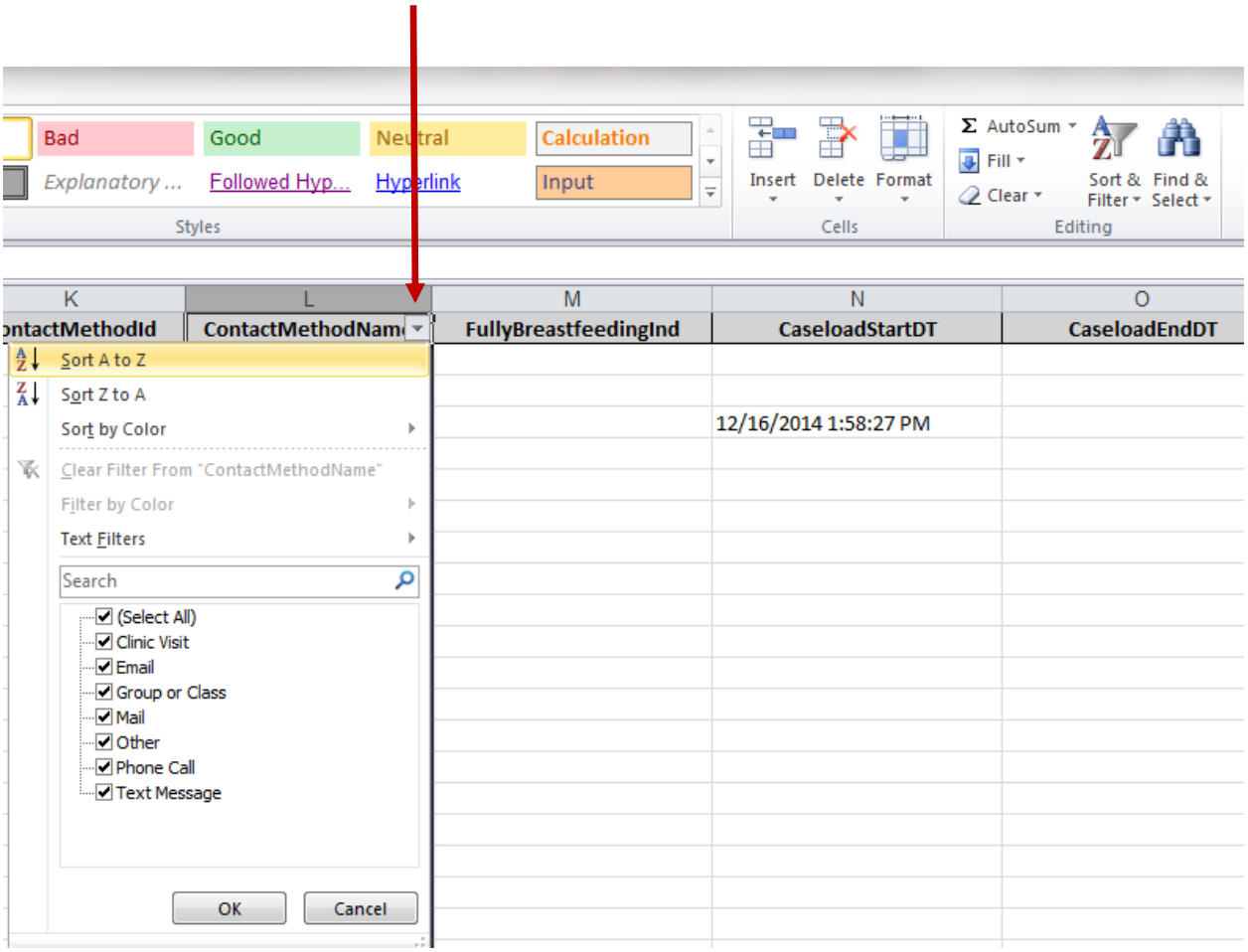
ContactMethodName
Clinic Visit
Text Message
Phone Call
Mail
Mail
Mail
Mail
Mail

This column can be filtered by type – for example all the clinic visits can be grouped together, all the text messages grouped together, etc.

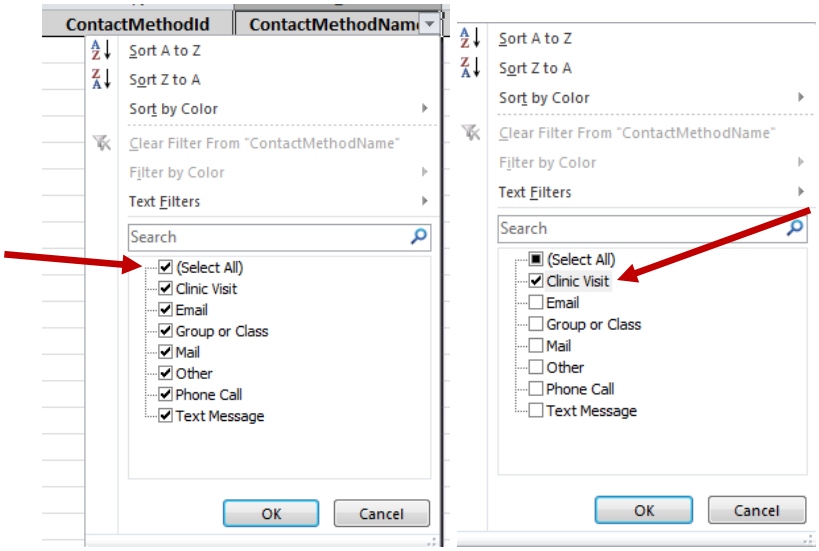
To filter, highlight the column(s) to be sorted and click on **[Sort and Filter]** and then select **[Filter.]**



Now click on the arrow at the top of the column in a box that looks like the one to the right of the column **[ContactMethodName]** in the screen shot below.



To filter for just "clinic visit" click **[Select All]** which clears all the check boxes and then check just the **[Clinic Visit]** box. When you press **[OK]** only the clinic visit contacts will appear. The number of rows tells you how many clinic visit contacts you made in the last quarter.

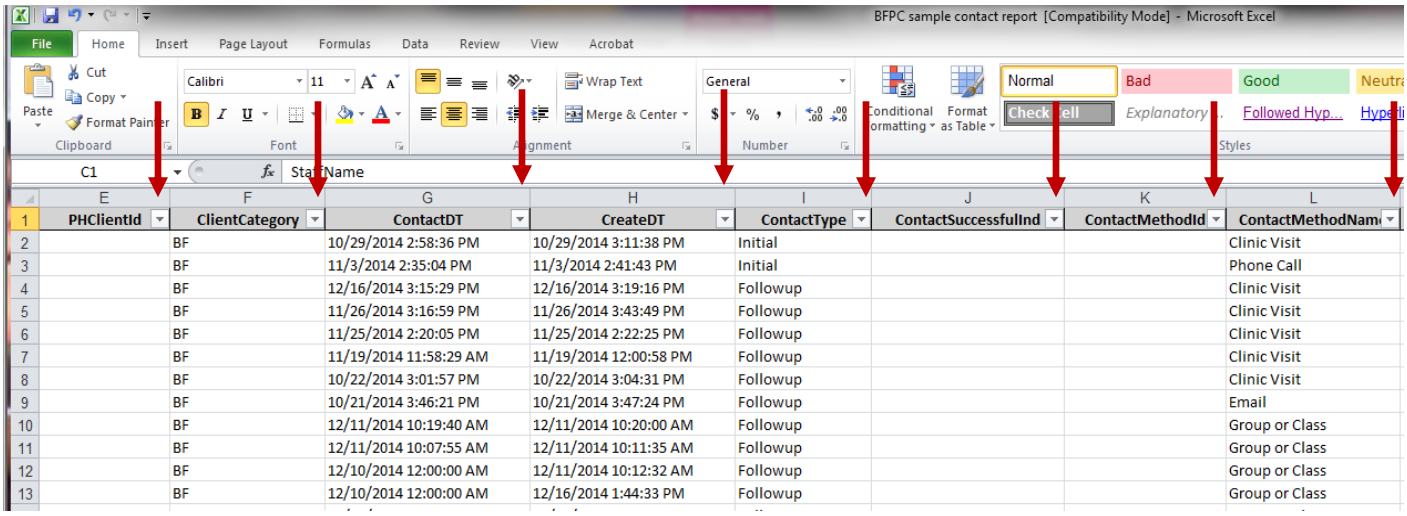


BUT you don't generally just want to know the number of clinic visits – you need to know if the client was newly pregnant or newly breastfeeding etc, etc. This calls for more filtering.

> **HINT:** Once you are done filtering, you can turn it off if desired. Click on **[Sort and Filter]** again and then **[Filter.]** All your filtering will disappear and all columns of the spreadsheet return.

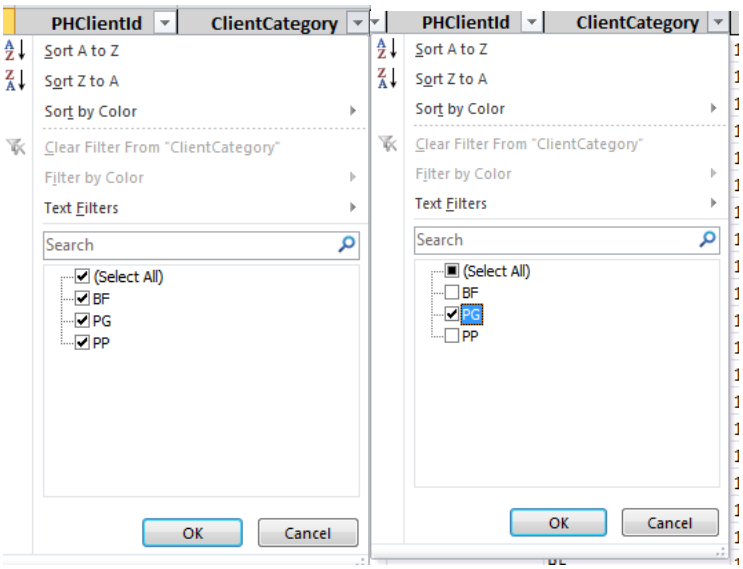
More than one column can be filtered using the method just used above. For quarterly reports most often you need to know the Client's Category, Contact Type, and Contact Method.

To start, click on **[Sort & Filter]** and then click on **[Filter]** in the drop down box. There are now arrows next to the name of the column for every column. (see picture below)



As you did for the **[ContactMethodName]** in the example above, click on the down arrow for the first column you want filtered – in this example let's choose **[ClientCategory]** – click on the down arrow to the right of **[ClientCategory]**.

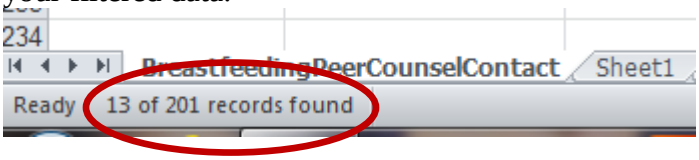
Click **[Select All]** then click which client category you wish to filter for first. For our example select **[PG]** (pregnant) and click **[OK]**. Now just all the pregnant women will appear in your spreadsheet.



Repeat this procedure for the columns **[ContactType]** and **[ContactMethodName]**. In the example below "Initial" was filtered for in the **[ContactType]** column and "Clinic Visit" was filtered for in the **[ContactMethodName]** column.

ClientCategory	ContactDT	CreateDT	ContactType	ContactSuccessfulInd	ContactMethodId	ContactMethodNam
PG	12/9/2014 4:42:29 PM	12/9/2014 4:50:37 PM	Initial			Clinic Visit
PG	12/9/2014 2:31:12 PM	12/9/2014 2:44:29 PM	Initial			Clinic Visit
PG	11/25/2014 3:49:33 PM	11/25/2014 3:52:06 PM	Initial			Clinic Visit
PG	11/25/2014 11:37:51 AM	11/25/2014 11:41:00 AM	Initial			Clinic Visit
PG	11/25/2014 10:28:04 AM	11/25/2014 10:30:04 AM	Initial			Clinic Visit
PG	11/18/2014 9:33:41 AM	11/18/2014 9:41:59 AM	Initial			Clinic Visit
PG	11/4/2014 2:55:12 PM	11/4/2014 4:57:39 PM	Initial			Clinic Visit
PG	11/4/2014 11:45:29 AM	11/4/2014 11:47:55 AM	Initial			Clinic Visit
PG	10/14/2014 4:47:22 PM	10/14/2014 4:49:40 PM	Initial			Clinic Visit
PG	10/14/2014 1:55:06 PM	10/14/2014 1:57:26 PM	Initial			Clinic Visit
PG	10/14/2014 10:02:37 AM	10/14/2014 10:07:46 AM	Initial			Clinic Visit
PG	10/7/2014 3:13:01 PM	10/7/2014 3:22:33 PM	Initial			Clinic Visit
PG	10/7/2014 9:37:13 AM	10/7/2014 9:42:55 AM	Initial			Clinic Visit

Look at the bottom left hand corner of your spreadsheet to see the number of records that match your filtered data.



The filtered data can now be used to complete the Quarterly BFPC Program report. Thirteen pregnant women were seen as newly pregnant (initial visit) for a clinic visit.

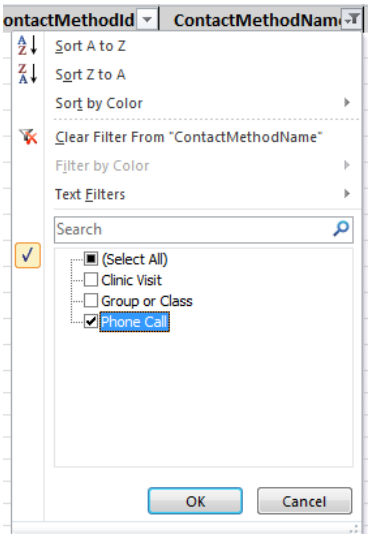
Kansas Quarterly BFPC Program Performance Measurement Report Form
BFPC: _____ Date: _____

Clinic:	Caseload:	Quarter: (Check one)
Today's Date:_____ BFPC Supervisor:_____ BFPC:_____		1st Jan-Mar ☐ 2nd Apr-June ☐ 3rd July-Sept ☐ 4th Oct-Dec ☐

Activity	Number of Contacts			
	Newly Pregnant	Newly Breastfeeding	Follow Up Pregnant	Follow Up Breastfeeding
Telephone Contacts				
Attempted Contacts				
Home Visits				
Clinic Visits	13			
Hospital Visits				
Groups or Classes				
Text				
Social Media (Facebook/Twitter)				
Other				
Yields to Breastfeeding Expert				
Totals				

*Contacts made via text or social media are counted as 1 day equals 1 contact.

To find the number of newly pregnant women receiving a phone call contact now click on the arrow in the **[ContactMethodName]** column and then unclick "Clinic Visit" and click "Phone Call" and click **[OK].**



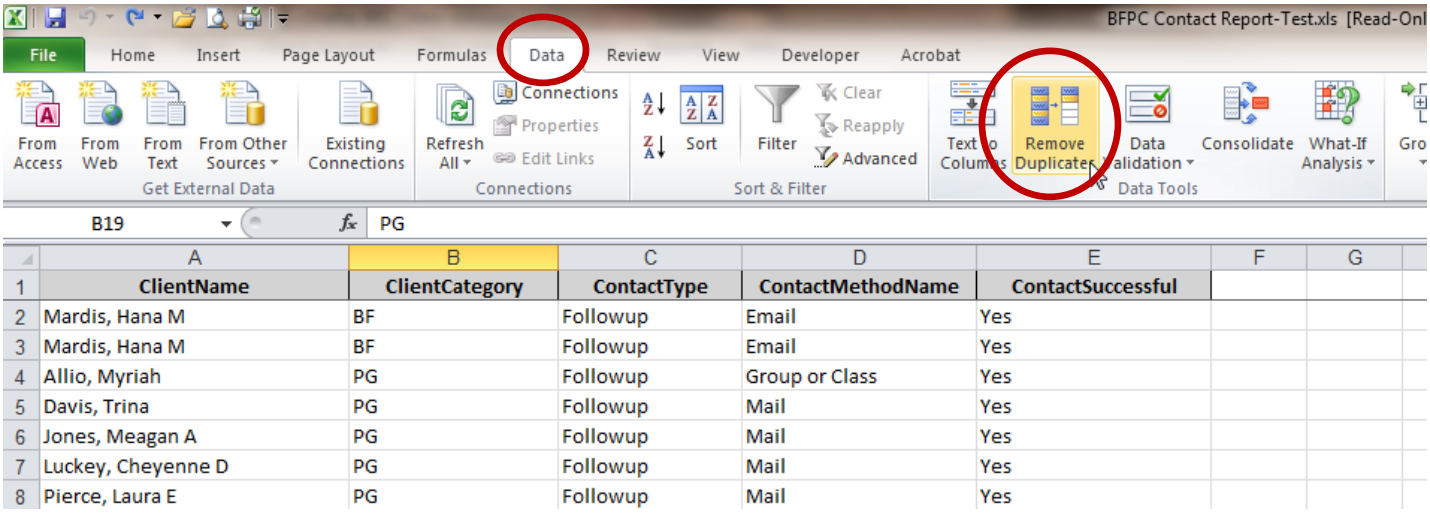
1	PHClientId	ClientCategory	ContactDT	CreateDT	ContactType	ContactSuccessfulInd	ContactMethodId	ContactMethodNam
116		PG	12/16/2014 1:58:27 PM	12/16/2014 1:59:06 PM	Initial			Phone Call
117		PG	11/19/2014 3:22:57 PM	11/19/2014 3:39:20 PM	Initial			Phone Call
118		PG	10/29/2014 1:27:25 PM	10/29/2014 1:31:52 PM	Initial			Phone Call
119		PG	10/14/2014 4:38:32 PM	10/14/2014 4:43:17 PM	Initial			Phone Call
120		PG	10/7/2014 4:20:33 PM	10/7/2014 4:22:38 PM	Initial			Phone Call
121		PG	10/7/2014 4:07:56 PM	10/7/2014 4:11:07 PM	Initial			Phone Call
122		PG	10/7/2014 3:50:48 PM	10/7/2014 3:55:28 PM	Initial			Phone Call
203								

Now the Quarterly Report Form can be completed with 7 telephone contacts for newly pregnant women.

HINT: Once you are done filtering, you can turn it off if desired. Click on **[Sort and Filter]** again and then **[Filter.]** All your filtering will disappear and the spreadsheet returns

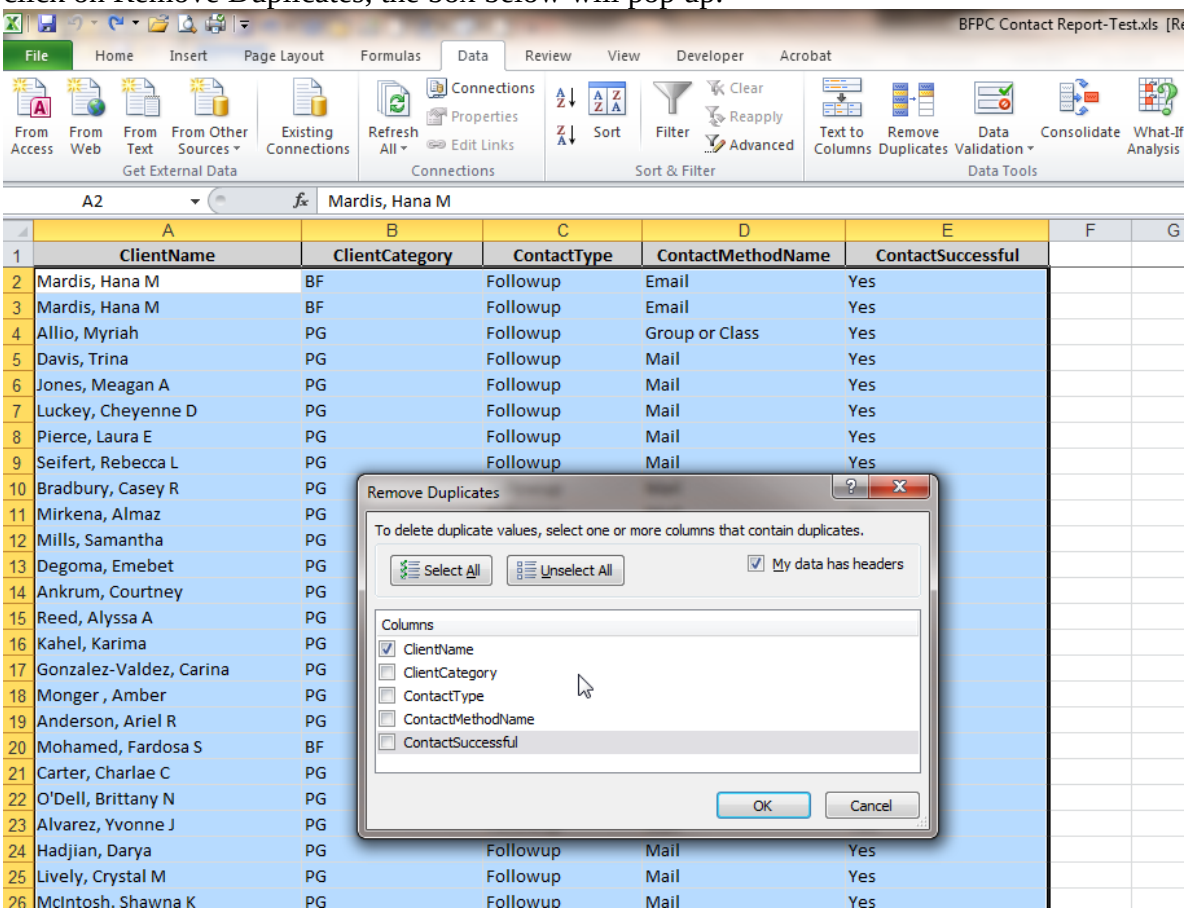
How to Remove Duplicate Records

You might also just want to know how many clients are in your caesload. The report prints a record for every contact you make, so if you see a client 6 times in one quarter that client will show on the contact report 6 times. Here's how to remove duplicate records to obtain an unduplicated count of clients.

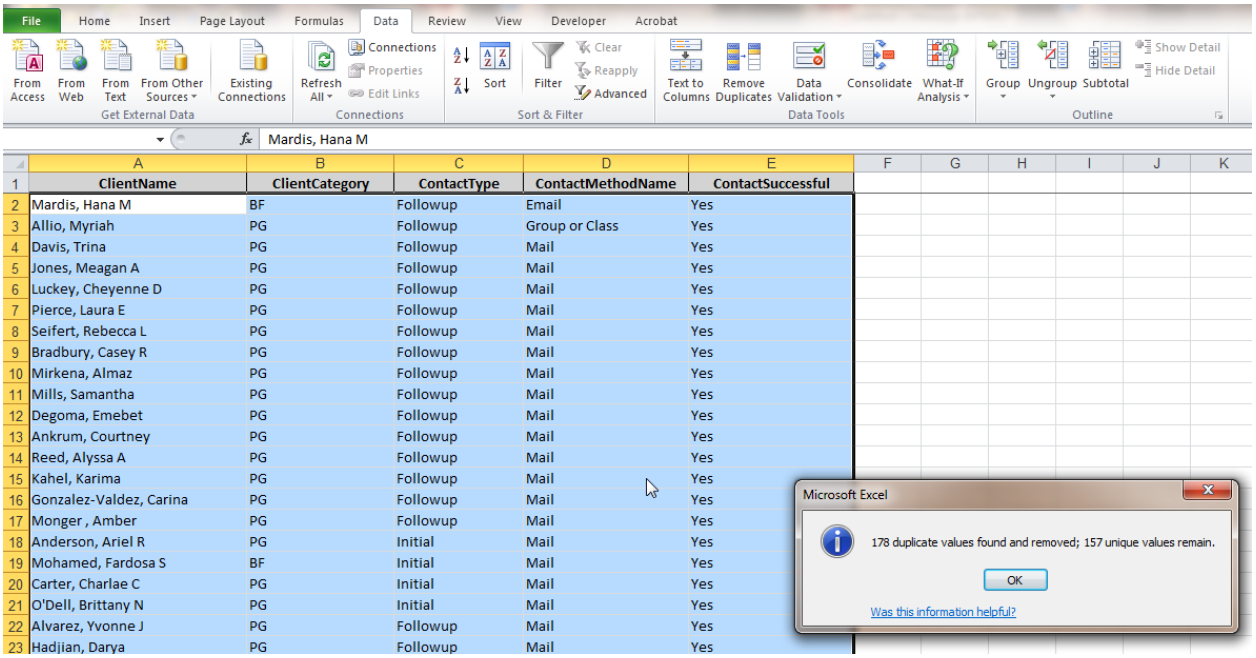


	A	B	C	D	E
1	ClientName	ClientCategory	ContactType	ContactMethodName	ContactSuccessful
2	Mardis, Hana M	BF	Followup	Email	Yes
3	Mardis, Hana M	BF	Followup	Email	Yes
4	Allio, Myriah	PG	Followup	Group or Class	Yes
5	Davis, Trina	PG	Followup	Mail	Yes
6	Jones, Meagan A	PG	Followup	Mail	Yes
7	Luckey, Cheyenne D	PG	Followup	Mail	Yes
8	Pierce, Laura E	PG	Followup	Mail	Yes

Click the Data tab at the top and in the Data Tools group select Remove Duplicates. After you click on Remove Duplicates, the box below will pop up.



Uncheck all boxes except for **[ClientName]** and then click OK.



	A	B	C	D	E
1	ClientName	ClientCategory	ContactType	ContactMethodName	ContactSuccessful
2	Mardis, Hana M	BF	Followup	Email	Yes
3	Allio, Myriah	PG	Followup	Group or Class	Yes
4	Davis, Trina	PG	Followup	Mail	Yes
5	Jones, Meagan A	PG	Followup	Mail	Yes
6	Luckey, Cheyenne D	PG	Followup	Mail	Yes
7	Pierce, Laura E	PG	Followup	Mail	Yes
8	Seifert, Rebecca L	PG	Followup	Mail	Yes
9	Bradbury, Casey R	PG	Followup	Mail	Yes
10	Mirkena, Almaz	PG	Followup	Mail	Yes
11	Mills, Samantha	PG	Followup	Mail	Yes
12	Degoma, Emebet	PG	Followup	Mail	Yes
13	Ankrum, Courtney	PG	Followup	Mail	Yes
14	Reed, Alyssa A	PG	Followup	Mail	Yes
15	Kahel, Karima	PG	Followup	Mail	Yes
16	Gonzalez-Valdez, Carina	PG	Followup	Mail	Yes
17	Monger , Amber	PG	Followup	Mail	Yes
18	Anderson, Ariel R	PG	Initial	Mail	Yes
19	Mohamed, Fardosa S	BF	Initial	Mail	Yes
20	Carter, Charlae C	PG	Initial	Mail	Yes
21	O'Dell, Brittany N	PG	Initial	Mail	Yes
22	Alvarez, Yvonne J	PG	Followup	Mail	Yes
23	Hadjian, Darya	PG	Followup	Mail	Yes

This last screen will come up letting you know how many duplicates were removed and how many unique values remain.

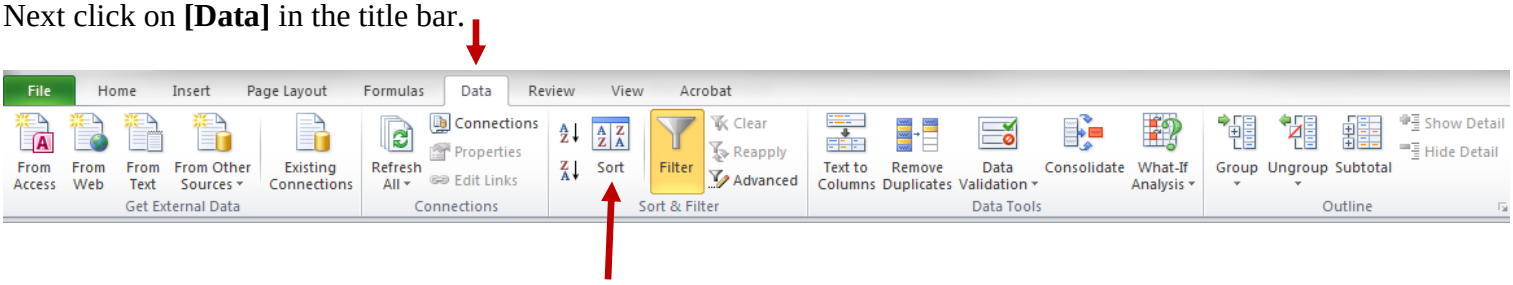
STOP and STRETCH!

Another Way to Manipulate Data in a Spreadsheet

Data in a spreadsheet can also be manipulated using this technique.
To get started click in the upper left hand corner of the spreadsheet to highlight the entire spreadsheet.

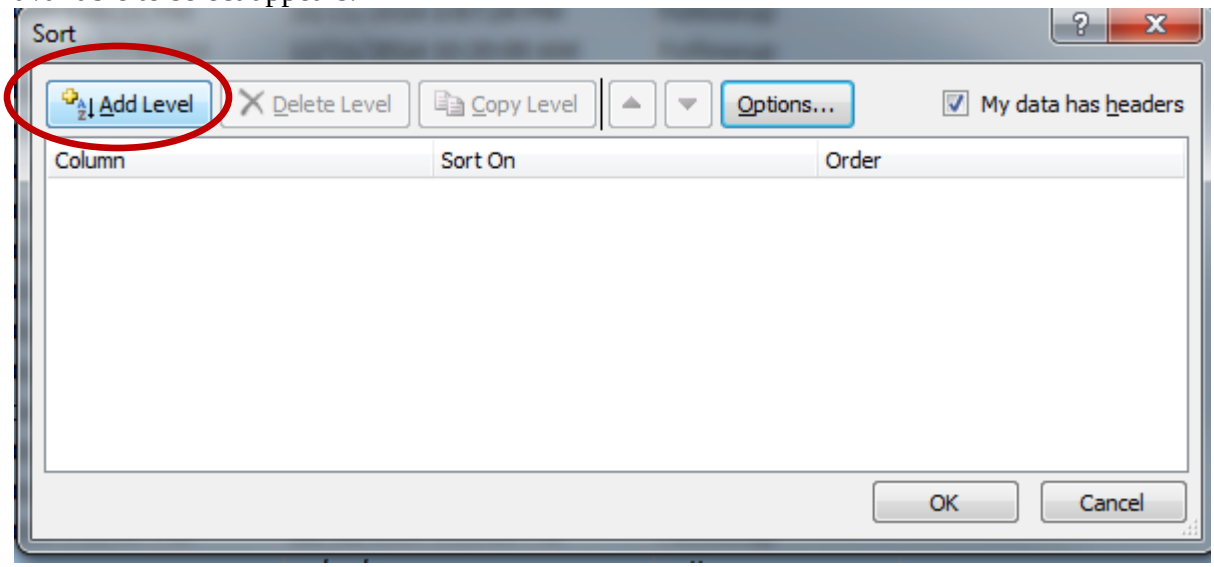
	D	E	F	G	H	I	J	K	L
1	ClientName	PHClientId	ClientCategory	ContactDT	CreateDT	ContactType	ContactSuccessfulInd	ContactMethodId	ContactMethodNam
2	Razo, Dora		BF	12/16/2014 3:15:29 PM	12/16/2014 3:19:16 PM	Followup			Clinic Visit

Next click on **[Data]** in the title bar.

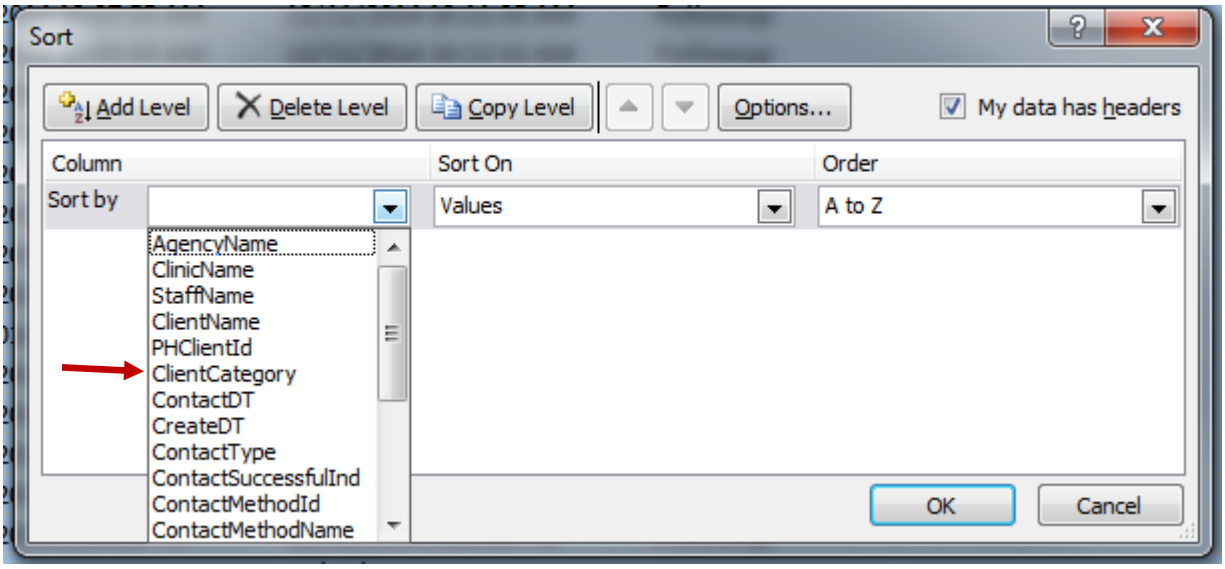


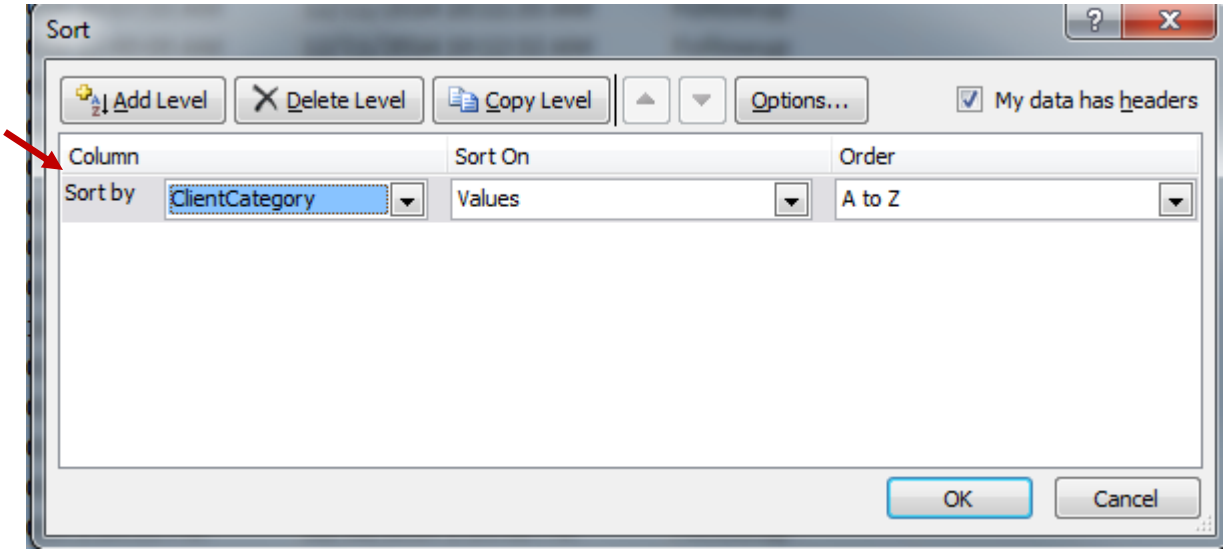
And then click **[Sort].**

A box like the one on the next page will appear. Click on **[Add Level]** and the list of columns available to select appears.

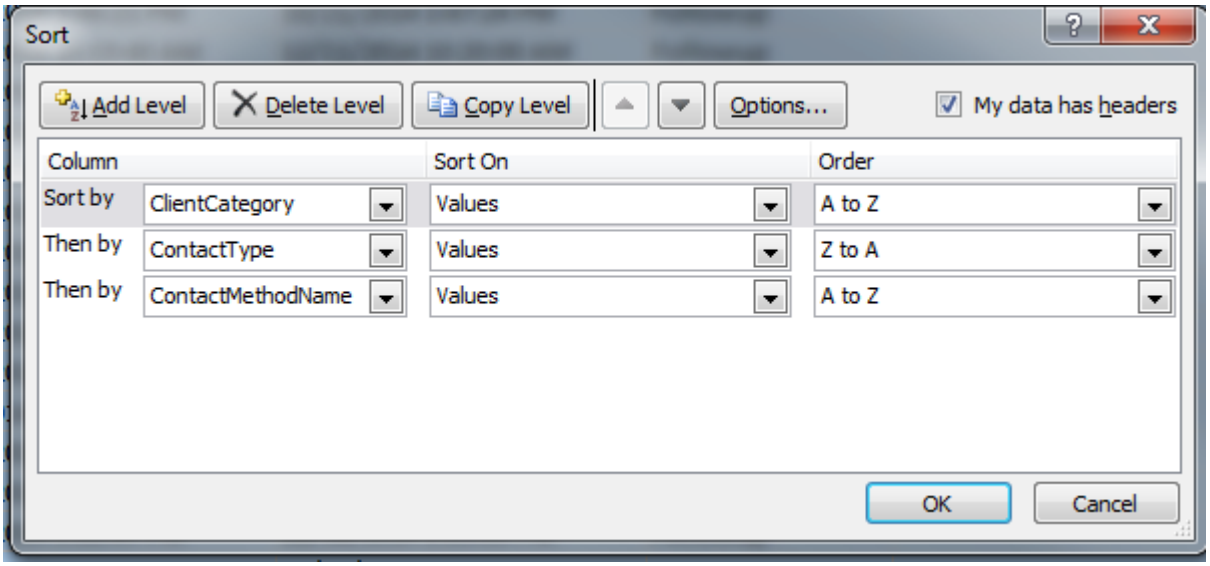


Since you would like to know how many pregnant women were seen for initial and follow up visits and how they were contacted select those 3 columns. Select the client category for the first level by clicking on **[ClientCategory].**





Now click on **[Add Level]** and select **[Contact Type]** for the 2nd level and click on **[Add Level]** and **[ContactMethodName]** for the 3rd level. You can now select the order you want each column to sort under **[Order]** A to Z or Z to A . In the selection below we wanted ContactType "Initial" contacts to show first so Z to A was selected.



When you click **[Ok]** the columns will sort appropriately. In the example below you can see all the columns with the ones selected sorted by order A to Z for ClientCategory and ContactMethodName and Z to A for ContactType.

HINT To hide excess columns to make your spreadsheet easier to manage, click on the Letter of the column to highlight and then press hide on your keyboard. For example to hide the ContactMethodID in the spreadsheet below, click on the **[K]** to highlight column K – ContactMethodId column and then right click on the column and then **[hide]** in the drop down box. To unhide a column highlight the column on either side of the hidden column, right click in one of the columns and click **[unhide]** in the drop down box.

F	G	H	I	J	K	L
ClientCategory	ContactDT	CreateDT	ContactType	ContactSuccessfulInd	ContactMethodId	ContactMethodNam
BF	10/29/2014 2:58:36 PM	10/29/2014 3:11:38 PM	Initial			Clinic Visit
BF	11/3/2014 2:35:04 PM	11/3/2014 2:41:43 PM	Initial			Phone Call
BF	12/16/2014 3:15:29 PM	12/16/2014 3:19:16 PM	Followup			Clinic Visit
BF	11/26/2014 3:16:59 PM	11/26/2014 3:43:49 PM	Followup			Clinic Visit
BF	11/25/2014 2:20:05 PM	11/25/2014 2:22:25 PM	Followup			Clinic Visit
BF	11/19/2014 11:58:29 AM	11/19/2014 12:00:58 PM	Followup			Clinic Visit
BF	10/22/2014 3:01:57 PM	10/22/2014 3:04:31 PM	Followup			Clinic Visit
BF	10/21/2014 3:46:21 PM	10/21/2014 3:47:24 PM	Followup			Email
BF	12/11/2014 10:19:40 AM	12/11/2014 10:20:00 AM	Followup			Group or Class
BF	12/11/2014 10:07:55 AM	12/11/2014 10:11:35 AM	Followup			Group or Class
BF	12/10/2014 12:00:00 AM	12/11/2014 10:12:32 AM	Followup			Group or Class
BF	12/10/2014 12:00:00 AM	12/16/2014 1:44:33 PM	Followup			Group or Class

If there are not too many, you can count the number of contacts to complete the BFPC Quarterly Report. For a large number of contacts you may wish to cut and paste a certain selection into a blank spreadsheet and note how many rows are used in the spreadsheet. Using the spreadsheet report above, the Quarterly BFPC report can be completed. For example there were two Initial contacts for breastfeeding women – one was a clinic visit and one was a phone call. Those have been added to the report below.

Kansas Quarterly BFPC Program Performance Measurement Report Form
BFPC: _____ Date: _____

Clinic:	Caseload:	Quarter: (Check one)
Today's Date: _____ BFPC Supervisor: _____ BFPC: _____		1st oct-dec ☐ 2nd jan-march ☐ 3rd april-june ☐ 4th july-sept ☐

Activity	Number of Contacts			
	Newly Pregnant	Newly Breastfeeding	Follow Up Pregnant	Follow Up Breastfeeding
Telephone Contacts		1		
Attempted Contacts				
Home Visits				
Clinic Visits		1		
Hospital Visits				
Groups or Classes				
Text				
Social Media (Facebook/Twitter)				
Other				
Yields to Breastfeeding Expert				
Totals		2		

Skill Builder

Run the BFPC Contact Report for a FFY Quarter to see how many contacts have been made. You might want to add a few more than Lisa Lemon. Save the report as an Excel Spread sheet and work through the steps above to create a Quarterly BFPC report.

STOP and STRETCH!

Nutrition Education

Open Nutrition Education in the Quick Links for Lisa Lemon. The Nutrition Education window consists of three tabs: Topics, Handouts, and Client Goals.

These tabs are used to document various aspects of nutrition education provided to the client. **You should talk with your BFPC supervisor about whether or not you will enter information into any of these screens. If you will not, still read the next pages so you know about these tabs in case you want to see what was recorded by staff at other visits.**

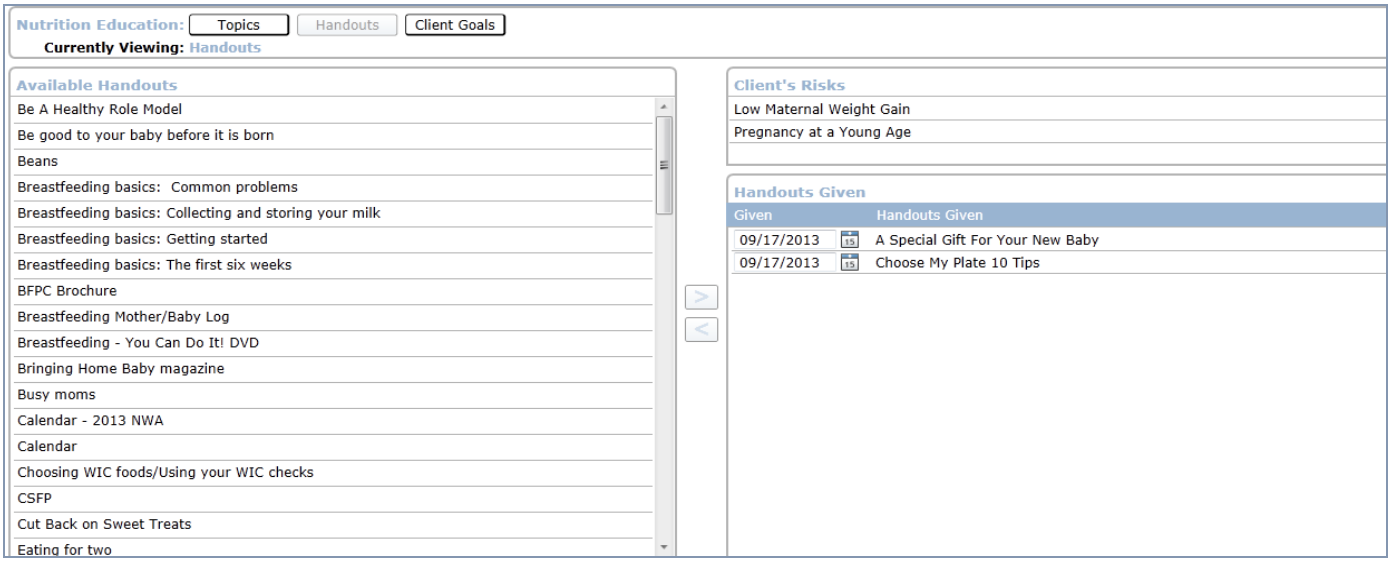
Topics Tab

The Topics tab works just like the Topics tab in the BFPC Summary. Since you add topics on the BFPC topics tab, you will not use the Nutrition Education Topics tab except perhaps to see what breastfeeding topics other staff has discussed.

Handouts Tab

The Handouts tab allows you to quickly document handouts provided to a client. Remember, do not provide "packets" of handouts. Prioritize the client's interests, concerns, and risk factors and try to select a pamphlet/s of real importance. Also it is best to review certain parts of the pamphlets, including marking some passages, and possibly using suggestions in a pamphlet to encourage the client to identify steps to changes.

The handouts are listed in alphabetical order on the left and are specific to client categories. Local clinics have the option to add their own handouts. You will select handouts the same way that you select topics.



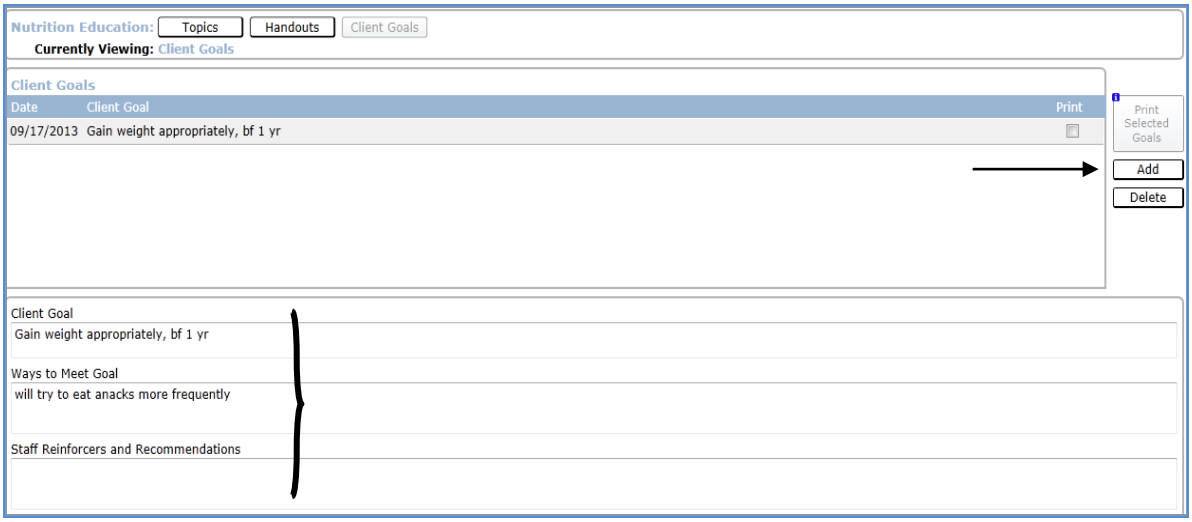
Select a handout or two for Lisa. Double click or use the Include button.

Click **[Save]**. If you want to leave the Nutrition Education screen, you would also click [**Cancel]**.

Client Goals Tab

The main purpose of the Client Goals Tab is to document information about the client's goals related to nutrition and health. As a BFPC, you probably will not be recording goals. However, it may be useful for you to click on the Goals tab and see what goal was recorded at the Certification. If the client is a breastfeeding mother and infant, there may be a goal related to how long the mom wants to breastfeed and steps to reach that goal.

As with many windows in KWIC, if you are going to create a new goal, click **[Add]** to get blank fields for you to record information gathered today.



More than one goal can be added by clicking the **[Add]** button. Use the **[Delete]** button if you mistakenly add a blank goal line.

If your supervisor does want you to add a goal sometimes, here is some guidance.

The goal shown above is to give you an example to demonstrate the following guidance. In reality, if you are instructed by your supervisor to use this screen, it probably will just be when you work with women who are currently breastfeeding, not a pregnant woman like Lisa.

- **Client Goal**

  Staff should encourage the client to identify a goal related to breastfeeding, nutrition or health considering the concerns already identified by the client. If the client had no concerns, staff might suggest a possible goal. Enter a short description of the client's goal (maximum of 200 characters). Use the client's words as much as possible, but staff may suggest more concrete wording.

  Many clients do not think about goals, so you might try to use words **other** than just "What goal do you have for eating or health?" Consider if these examples might conversation-starters for you to try.

  - *"You said that breastfeeding is going well. About how many months would you like to breastfeed?"*

  - *"You mentioned that Baby Susie's dad would like to help feed, but can't because you're breastfeeding. What do you think about having a goal about encouraging him to help with other things to feel involved with Susie?* Be prepared to offer a couple **concrete** suggestions if mom is unsure.

  It can be challenging to get clients to participate in developing a plan, so takes some practice in encouraging it. Ideally the goal should be the client's idea, but sometimes it helps for the counselor to provide some suggestions to make it more concrete or, as in the last example, to make a suggestion based on a risk we have identified.

- **Ways to Meet Goal**

  This section allows you to work with the client to identify a few concrete steps that can help the client reach the goal. It can take considerable skill to help the client think about very specific, realistic steps that they are likely to do.

  This information is for the client so the language and steps should be simple, concise, and doable. You might first need to explore barriers to the identified goal. Then ask the clients for

some very specific possibilities to get around that problem. Many handouts offer a list of suggestions. Consider showing such a list to the client and asking something like, *"Do you think any of these steps might work for you?"* If so, ask the client to identify which ones they might use or adapt. You can mark them on the handout and record in KWIC.

Here is another example.
"*So you have a goal to breastfeed for at least 6 months, but you've talked about having pain and are concerned about how much breast milk you are producing. Let's talk about some things to try.*

Then after the conversation, you might end up with four different things as "Ways to meet goal."

1. Lean back more and support baby with pillow during nursing.
2. Watch for early hunger cues and nurse before baby gets too hungry.
3. Call me (BFPC) tomorrow afternoon to let me know how things are going.
4. Come back to WIC in X days to have the baby weighed.

- **Staff Reinforcers and Recommendations**
  This field is optional. It is a space for staff members to document what they would like to have reinforced at a future visit. This might be something reinforced during a visit with a dietitian or nurse at a one-on-one secondary education visit for this certification period, or at the next certification appointment. You might also note recommendations made to the client or recommendations to WIC staff who may work with the client in the future.

  When complete, click **[Save]** or just click another tab in the Nutrition Education window if you have more Topics and Handouts to add. Then save when you've done all three of the Nutrition Education screens. Every time you save, you create a contact in History.

- **Print Client Goal Check Box**

  After you save the window, the client goal will display in the upper section. If desired, you can print the Client Goal and Ways to Meet Goal.

  - Check the **Print** checkbox for the goal(s) you want included on the report.

  - Click the **[Print Selected Goals]** button.

  For each goal selected, the printout includes the date the goal was recorded, the goal description, and the contents of the Ways to Meet Goal field. There is not much point in printing off the goal if the goal and "ways to meet" are generic and broad. On the other hand, if the ways to meet the goal are very concrete, you can offer to print them out and suggest she put them somewhere she'll see them regularly.

Skill Builder

If you did not enter a topic and handout for Lisa Lemon, go back and enter those now. Save.

Repeat reminder – Talk with your supervisor about which screens in KWIC she thinks you will use in your specific clinic and working circumstances.

The End